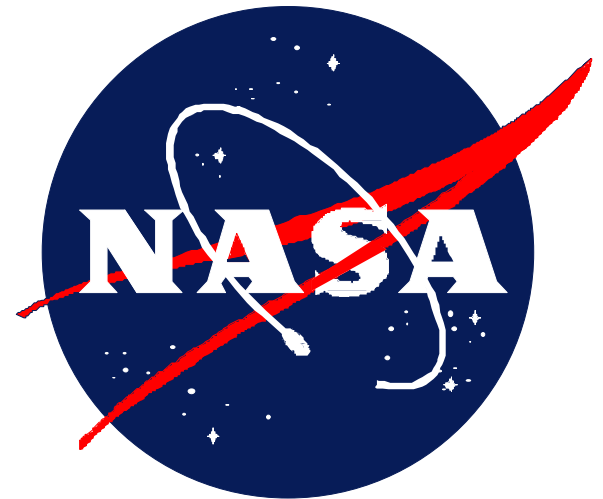




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**Welcome to...**

**Budget Formulation:  
Service Pool Planning  
Training**

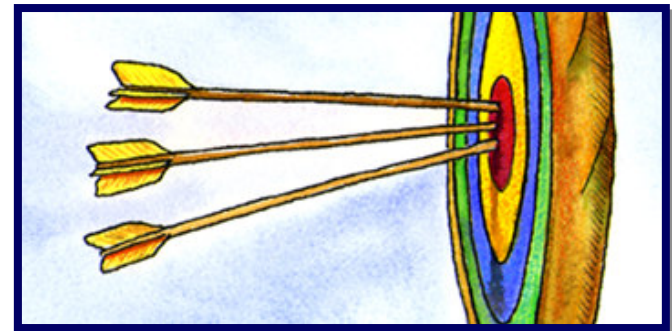




## Course Objectives

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- At the end of this course, individuals should be able to use the Budget Formulation System to:
  - Distribute Full Time Equivalents (FTEs) and Travel Dollars to sub-pools.
  - View phasing plans

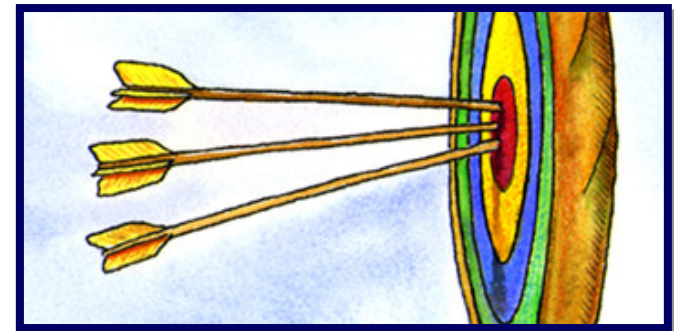




## Course Objectives (Cont.)

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- At the end of this course, individuals should understand:
  - An overview of the system and how it is integrated
  - The business context for using the system
  - The roles that are in the class







# Benefits of Service Pool Planning

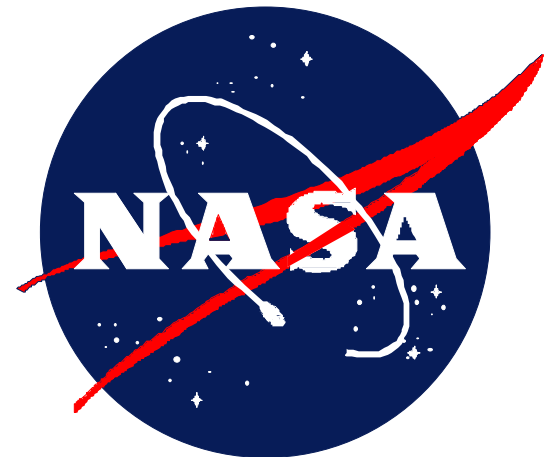
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- The Budget Formulation System provides a means to:
  - Formulate institutional, program, enterprise and Agency level budgets.
  - Support budget development, advocacy, internal/external reporting, and full cost budgeting and management.
  - Support top-down and bottom-up decision making.





# Service Pool Planning Business Process Overview and Role Overview





## ■ The two roles in the class and how they are different

### ● Service Pool Authorizer

- Distributes the Center's SP authorizations for FTEs and Travel \$ from Service Pools to Sub-pools.
- Has access to the Service Pools – Secondary FTE Distribution and Service Pools – Secondary Travel Dollar Distribution folders.

### ● Service Pool Requester

- Requests FTEs, Travel, Service Pool units, Other Direct Dollars and WYEs at the sub-pool level.
- Has access to the Svc Pool (FTE, Travel, SP, Other Direct \$, WYE) and SP – Phasing (Other Direct \$) folders.







# Service Pool Planning Business Process Overview

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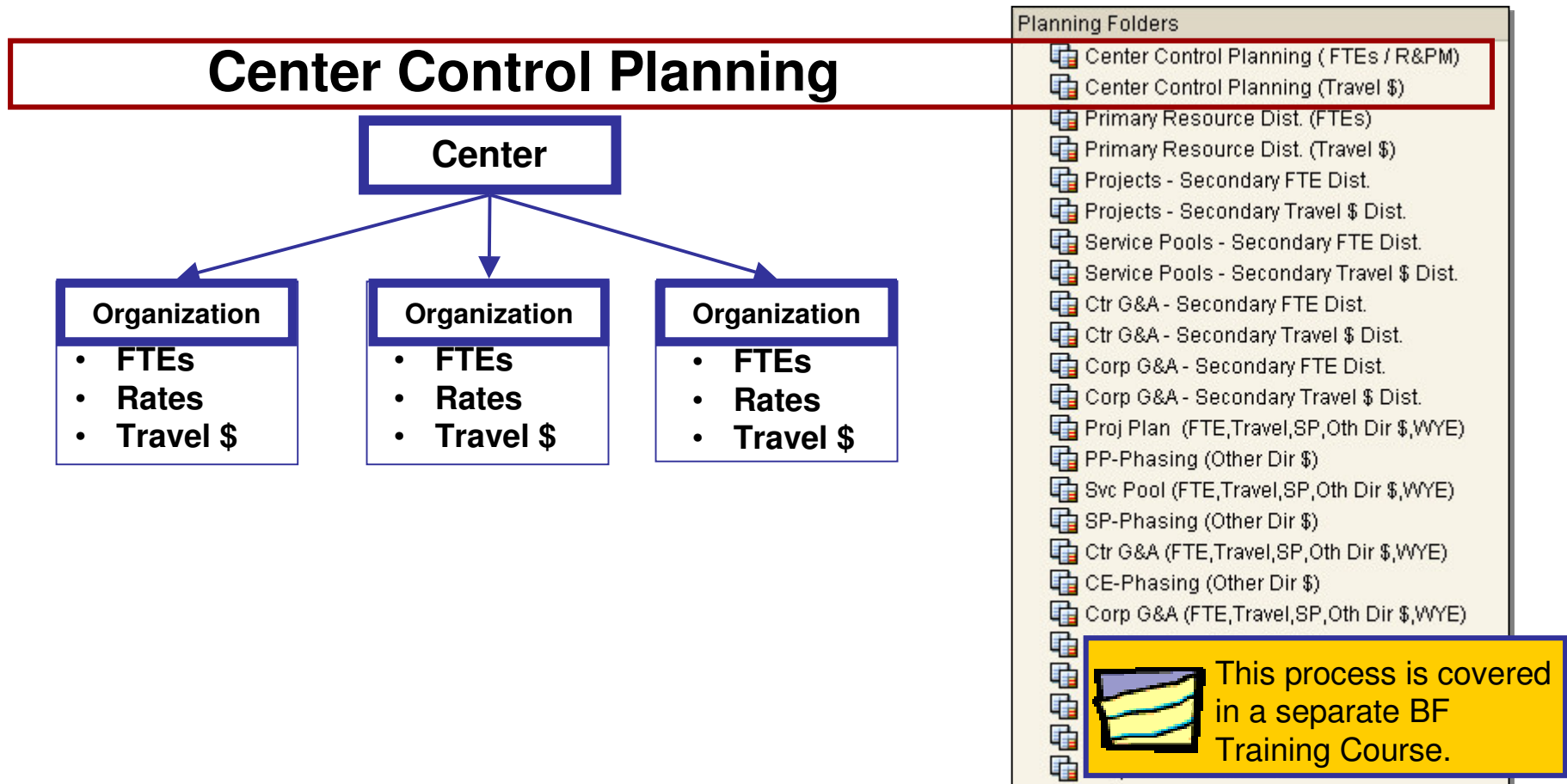
## ■ Key Points:

- The overall goal of the functionality
- The “process” as it relates to the system, i.e. what gets entered first, where it goes after you are done with it
- What is happening in the different phases of the budget cycle
- Negotiations (requested vs. authorized)



# Visualizing the system

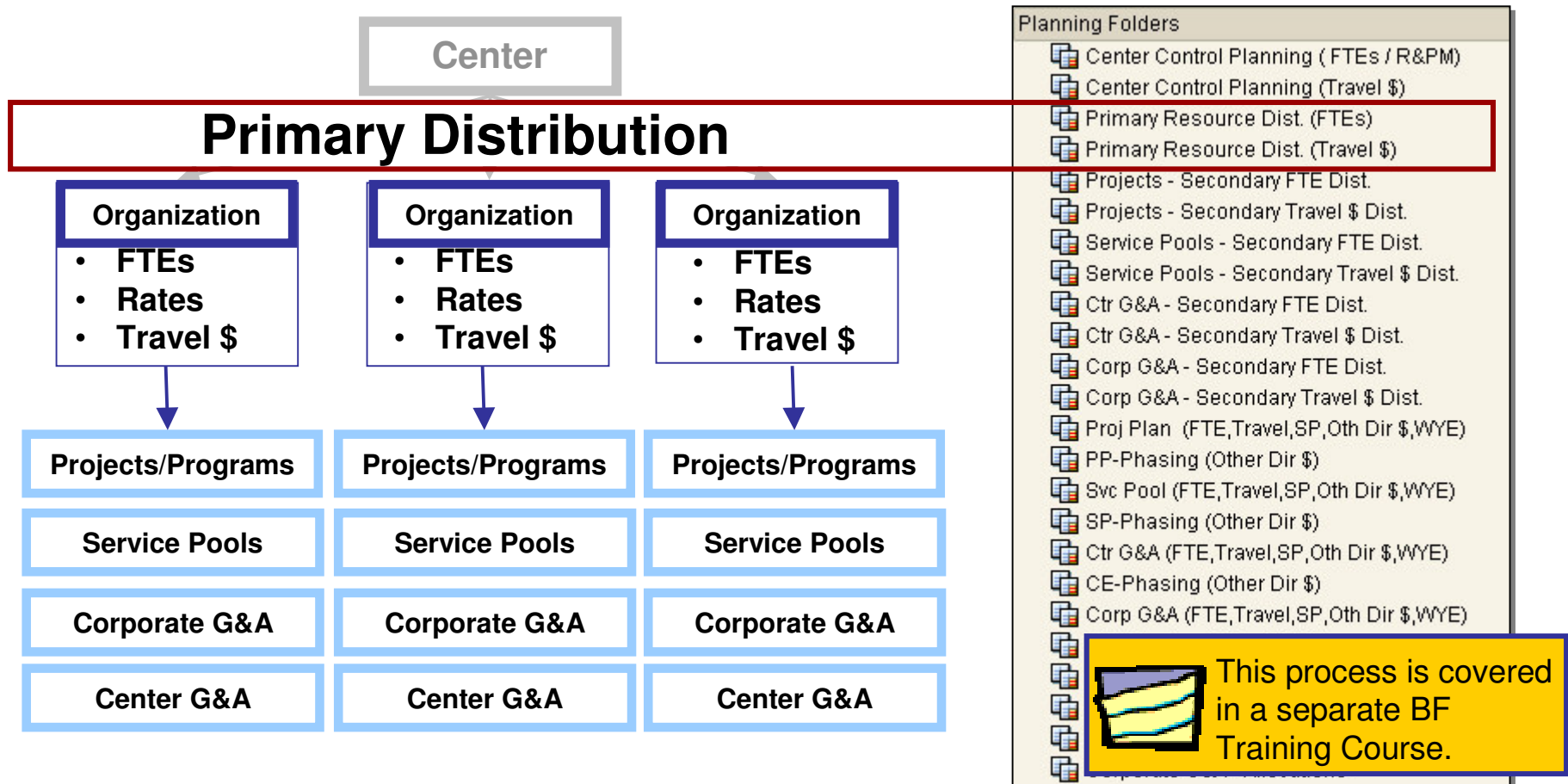
## Center Control Planning FTE Dist.



- This data is used by the Center Organizational FTE Authorizers to do the distribution of FTEs throughout the organization.



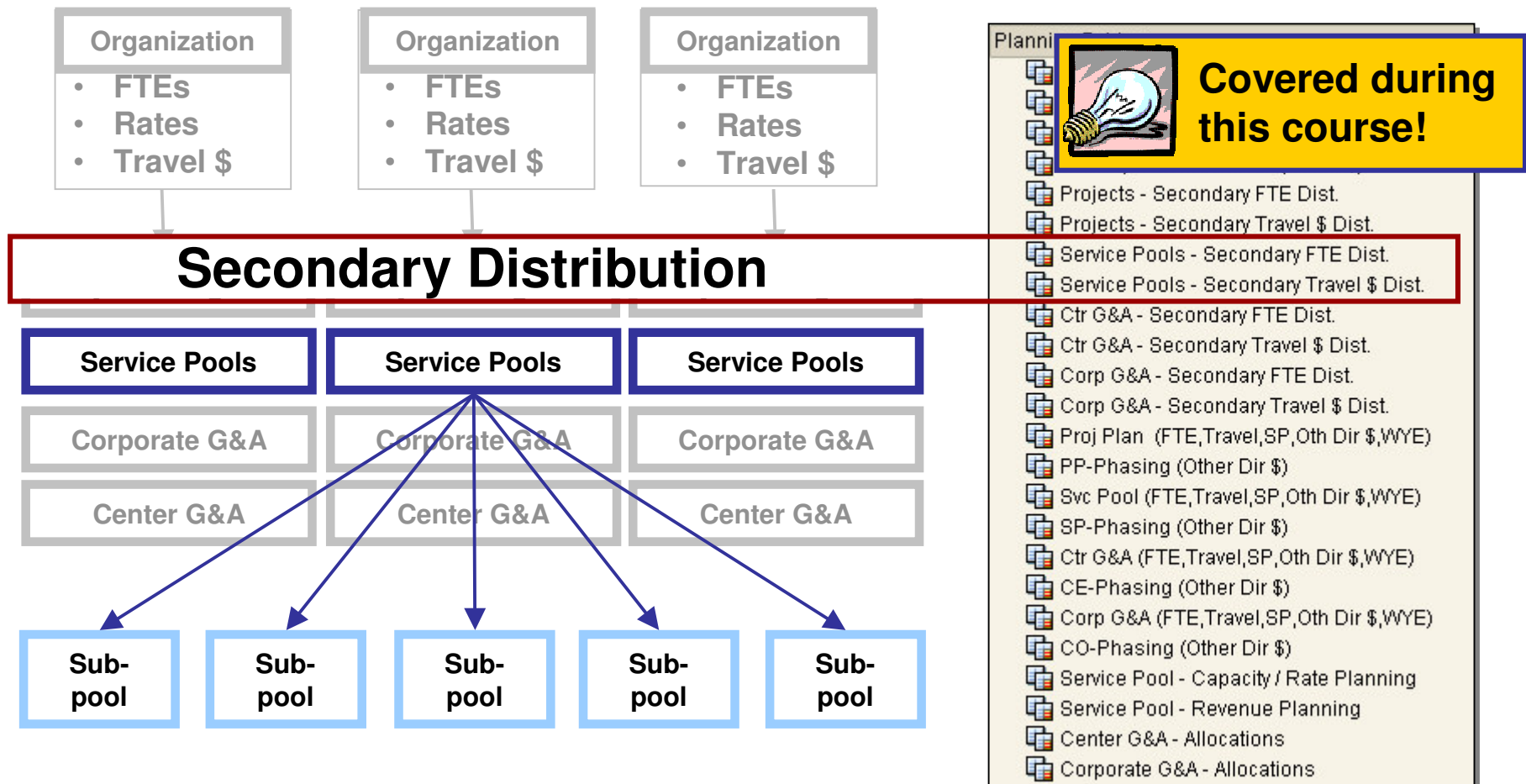
# Visualizing the system Primary FTE Dist.



- This data is used by the Secondary Authorizers to do the primary distribution of FTEs to WBS', sub-pools, Corporate and Center G&A pools.
- NOTE: Project Definition is defined as a UPN 5*



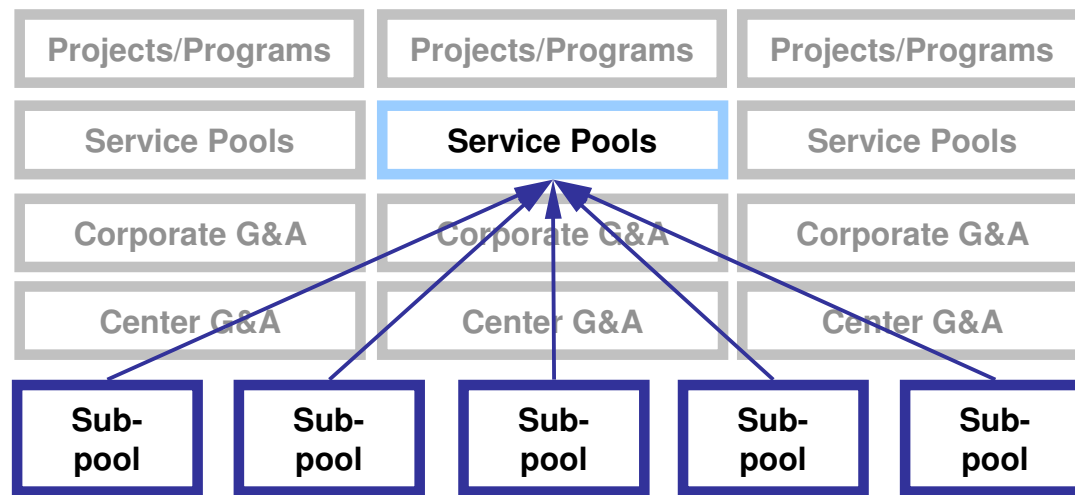
# Visualizing the system Secondary FTE Dist.



- This data is used by the Service Pool Authorizers to do the secondary distribution of FTEs from Service Pools to Sub-pools.



# Visualizing the system Sub-pool Requests



## Sub-pool Requests

| Planning Folders |   |
|------------------|---|
|                  | Center Control Planning ( FTEs / R&PM)    |
|                  | Center                                    |
|                  | Prim                                      |
|                  | Prim                                      |
|                  | Proj                                      |
|                  | Projects - Secondary Travel \$ Dist.      |
|                  | Service Pools - Secondary FTE Dist.       |
|                  | Service Pools - Secondary Travel \$ Dist. |
|                  | Ctr G&A - Secondary FTE Dist.             |
|                  | Ctr G&A - Secondary Travel \$ Dist.       |
|                  | Corp G&A - Secondary FTE Dist.            |
|                  | Corp G&A - Secondary Travel \$ Dist.      |
|                  | Proj Plan (FTE,Travel,SP,Oth Dir \$,WYE)  |
|                  | PP-Phasing (Other Dir \$)                 |
|                  | Svc Pool (FTE,Travel,SP,Oth Dir \$,WYE)   |
|                  | SP-Phasing (Other Dir \$)                 |
|                  | Ctr G&A (FTE,Travel,SP,Oth Dir \$,WYE)    |
|                  | CE-Phasing (Other Dir \$)                 |
|                  | Corp G&A (FTE,Travel,SP,Oth Dir \$,WYE)   |
|                  | CO-Phasing (Other Dir \$)                 |
|                  | Service Pool - Capacity / Rate Planning   |
|                  | Service Pool - Revenue Planning           |
|                  | Center G&A - Allocations                  |
|                  | Corporate G&A - Allocations               |



**Covered during  
this course!**

- This data is used by the Service Pool Requesters to request FTEs, Travel \$, Service Pool units, Other Direct \$ and WYEs.





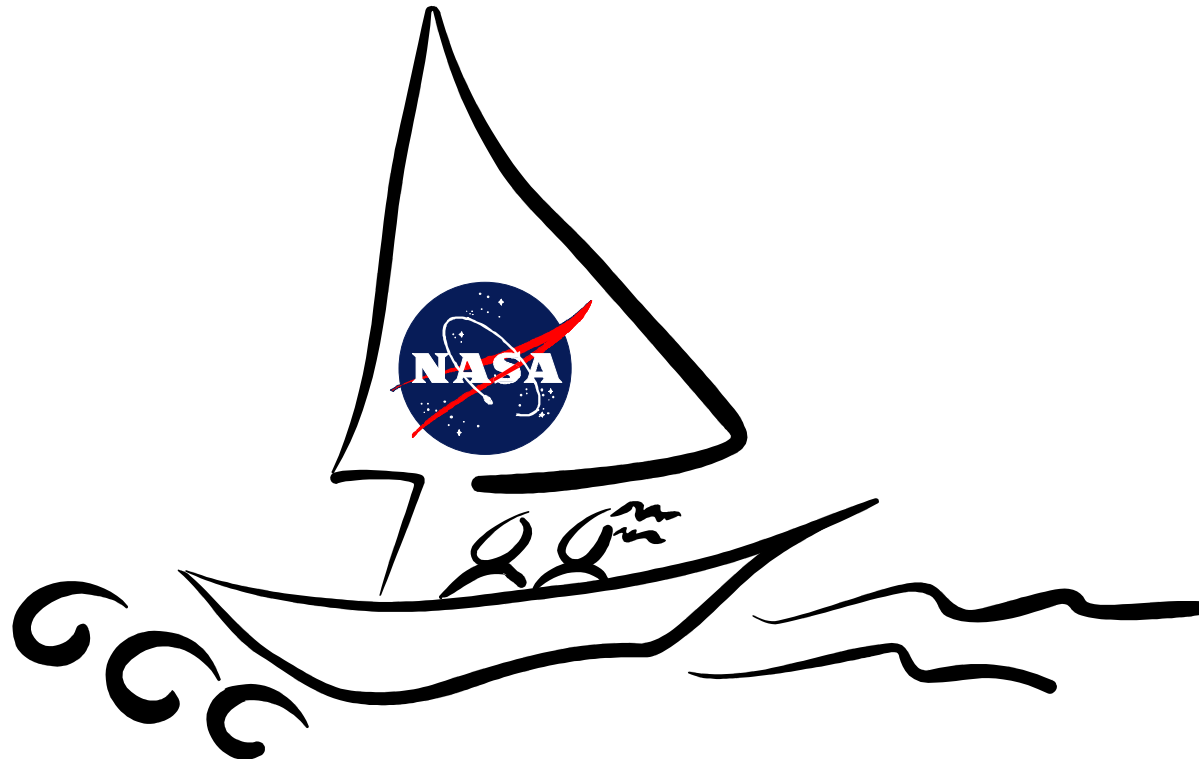
# Service Pool Planning Activities

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- **Service Pool Planners reconcile last year's service pool FTE Requirements with preliminary agency guidelines.**
- **Service Pool Planners estimate and negotiate requirements for FTEs, Travel dollars, WYEs, Other Direct dollars**
- **Phasing of Service Pool requirements for FTEs, Travel dollars, WYEs, and Other Direct dollars.**
- **Service Pool Estimators define Service Pool capacity, rate, and revenue plans.**
- **Service Pool costs are allocated to projects.**

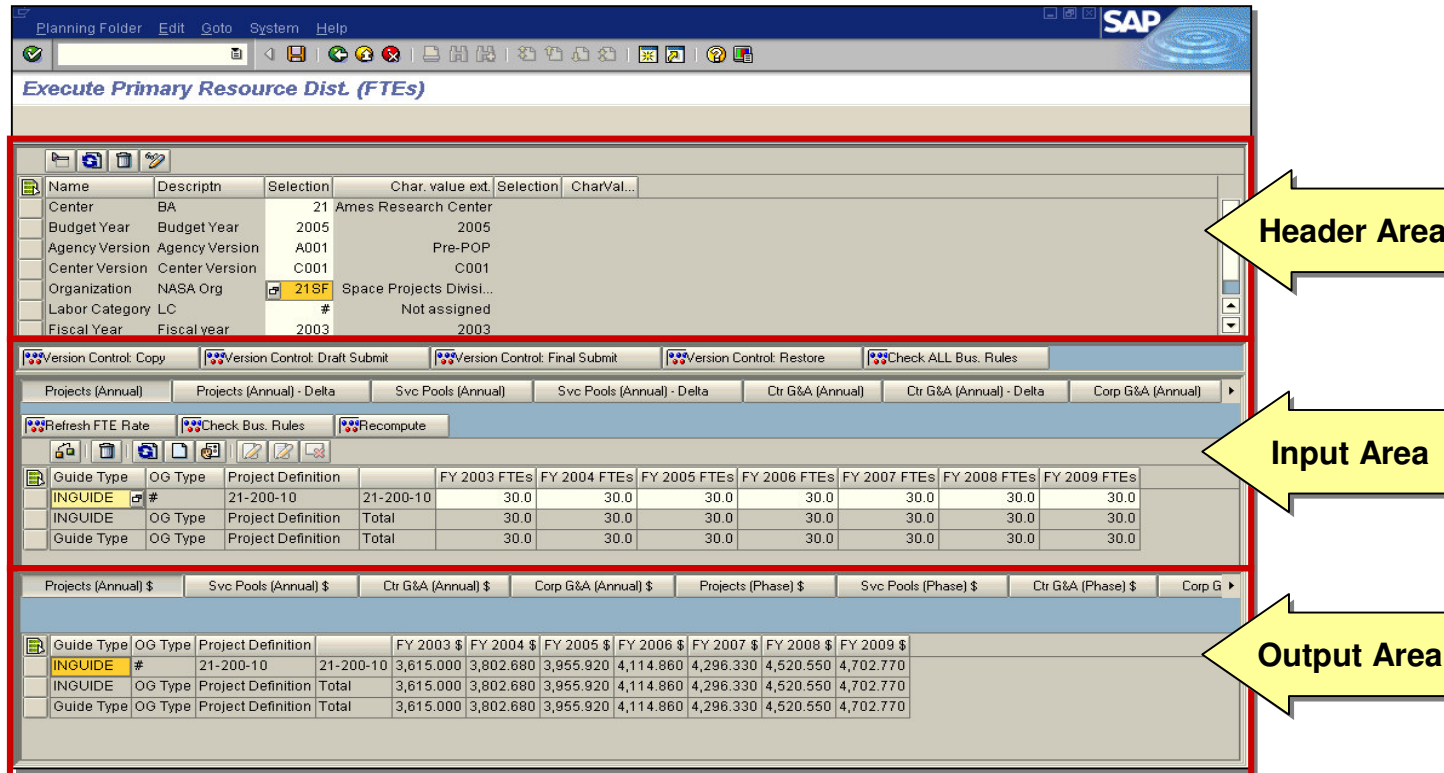


# BF Navigation Overview





# What Are the Primary Sections of a Typical Screen?



The screenshot shows the SAP 'Execute Primary Resource Dist. (FTEs)' screen. The interface is divided into three main sections as indicated by yellow arrows:

- Header Area:** Contains fields for Name, Descriptn, Selection, Char. value ext, Selection, and CharVal. The data shown includes: Center BA, 21 Ames Research Center, Budget Year 2005, Agency Version A001, Center Version C001, Organization NASA Org, Labor Category LC, and Fiscal Year 2003.
- Input Area:** Contains buttons for Version Control (Copy, Draft Submit, Final Submit, Restore) and Check ALL Bus. Rules. Below these are tabs for Projects (Annual), Projects (Annual) - Delta, Svc Pools (Annual), Svc Pools (Annual) - Delta, Ctr G&A (Annual), Ctr G&A (Annual) - Delta, and Corp G&A (Annual). There are also buttons for Refresh FTE Rate, Check Bus. Rules, and Recompute.
- Output Area:** Contains two tables. The first table shows FTEs for FY 2003 through FY 2009. The second table shows dollar amounts for the same years.

| Guide Type | OG Type | Project Definition |           | FY 2003 FTEs | FY 2004 FTEs | FY 2005 FTEs | FY 2006 FTEs | FY 2007 FTEs | FY 2008 FTEs | FY 2009 FTEs |
|------------|---------|--------------------|-----------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| INGUIDE    | #       | 21-200-10          | 21-200-10 | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         |
| INGUIDE    | OG Type | Project Definition | Total     | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         |
| Guide Type | OG Type | Project Definition | Total     | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         | 30.0         |

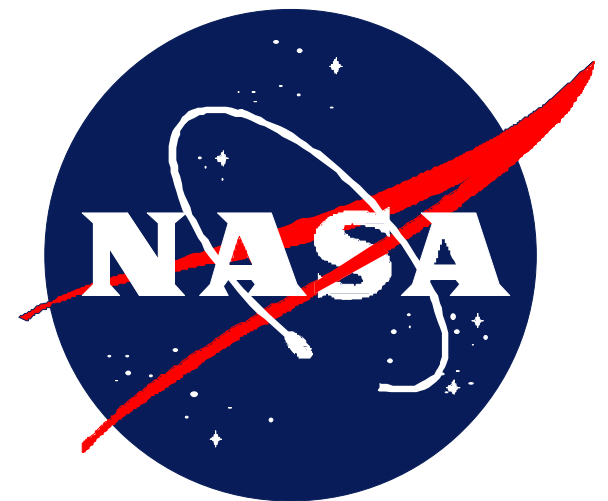
| Guide Type | OG Type | Project Definition |           | FY 2003 \$ | FY 2004 \$ | FY 2005 \$ | FY 2006 \$ | FY 2007 \$ | FY 2008 \$ | FY 2009 \$ |
|------------|---------|--------------------|-----------|------------|------------|------------|------------|------------|------------|------------|
| INGUIDE    | #       | 21-200-10          | 21-200-10 | 3,615.000  | 3,802.680  | 3,955.920  | 4,114.860  | 4,296.330  | 4,520.550  | 4,702.770  |
| INGUIDE    | OG Type | Project Definition | Total     | 3,615.000  | 3,802.680  | 3,955.920  | 4,114.860  | 4,296.330  | 4,520.550  | 4,702.770  |
| Guide Type | OG Type | Project Definition | Total     | 3,615.000  | 3,802.680  | 3,955.920  | 4,114.860  | 4,296.330  | 4,520.550  | 4,702.770  |

■ Screens have three primary areas:

- Header area
- Input Area
- Output Area



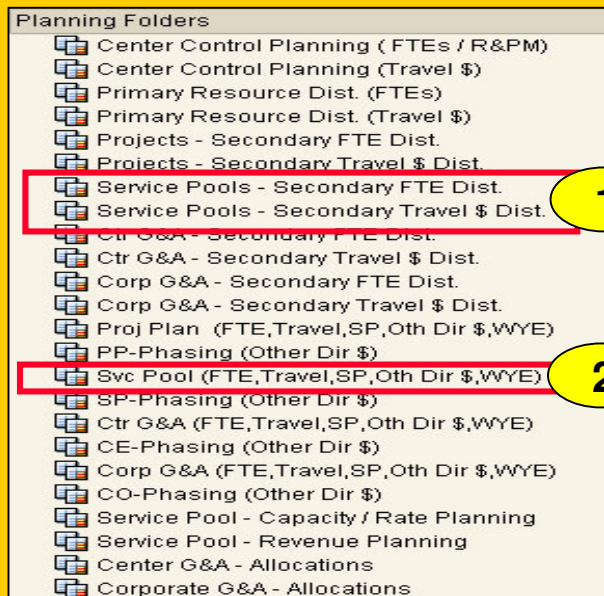
# Service Pool Authorizer







# Process Flow: Service Pool Authorizer

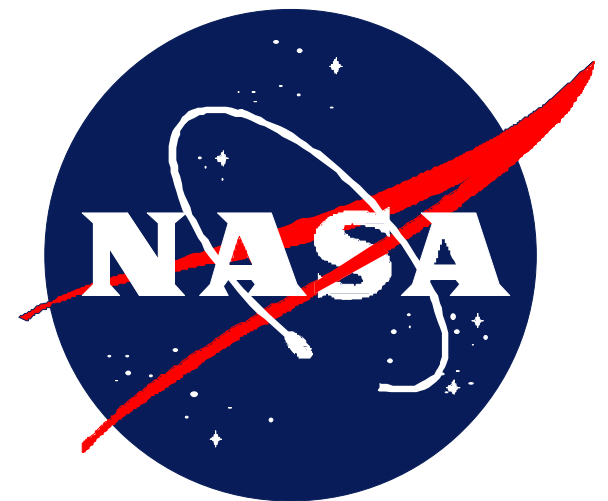


**In the Service Pool Secondary FTE & Travel \$ folder, the Service Pool Authorizer distributes FTEs, Travel \$, Service Pool units, Other Direct \$ and WYEs.**

**In the Service Pool Requester folder, the Service Pool Requester requests FTEs, Travel \$, Service Pool units, Other Direct \$ and WYEs.**



# Secondary FTE Distribution





## Distributing Annual FTEs to Sub-pools

- **Goal:** Take the annual Service Pool FTE Control Total and distribute it to the Sub-pools within the Service Pool.

- **Steps:** Entering header data:

1. Log On
2. Open Service Pools –  
Secondary FTE Dist Folder
  1. Enter Header Data
  2. Click on FTE (Annual) Button







# Service Pools – Secondary FTE Dist

## FTE Annual Input Layout

Planning Folder Edit Goto System Help

Execute Service Pools - Secondary FTE Dist

| Name           | Descriptn      | Selection | Characteristic Value             | Ext. Display | Selection | CharVal... |
|----------------|----------------|-----------|----------------------------------|--------------|-----------|------------|
| Center         | BA             | 21        | Ames Research Center             |              |           |            |
| Budget Year    | Budget Year    | 2000      |                                  | 2000         |           |            |
| Agency Version | Agency Version | A001      |                                  | Pre-POP      |           |            |
| Center Version | Center Version | C001      |                                  | C001         |           |            |
| Service Pool   | Pool           | IT        | INFO TECH SERVICES               |              |           |            |
| Organization   | NASA Org       | 21JT      | Applied Information Technolog... |              |           |            |
| Labor Category | LC             | #         | Not assigned                     |              |           |            |
| Fiscal Year    | Fiscal year    | 1998      |                                  | 1998         |           |            |

Version Control: Copy Version Control: Draft Submit

FTE (Annual) FTE (Annual) - Delta

Recompute Refresh FTE Rates Check Bus...

| Guide Type | OG Type | Sub-Pool  |          |
|------------|---------|-----------|----------|
| INGUIDE    | #       | DESKTOP   | DESKTOP  |
| INGUIDE    | #       | ITSYSTEMS | ITSYSTEM |
| INGUIDE    | #       | PHONE     | PHONE    |

FTE \$(Annual) FTE \$(Phase) FTE \$(Phase)

| Guide Type | OG Type | Sub-Pool  |          |
|------------|---------|-----------|----------|
| INGUIDE    | #       | DESKTOP   | DESKTOP  |
| INGUIDE    | #       | ITSYSTEMS | ITSYSTEM |
| INGUIDE    | #       | PHONE     | PHONE    |

| Name           | Descriptn      | Selection | Characteristic Value             | Ext. Display | Selection | CharVal... |
|----------------|----------------|-----------|----------------------------------|--------------|-----------|------------|
| Center         | BA             | 21        | Ames Research Center             |              |           |            |
| Budget Year    | Budget Year    | 2000      |                                  | 2000         |           |            |
| Agency Version | Agency Version | A001      |                                  | Pre-POP      |           |            |
| Center Version | Center Version | C001      |                                  | C001         |           |            |
| Service Pool   | Pool           | IT        | INFO TECH SERVICES               |              |           |            |
| Organization   | NASA Org       | 21JT      | Applied Information Technolog... |              |           |            |
| Labor Category | LC             | #         | Not assigned                     |              |           |            |
| Fiscal Year    | Fiscal year    | 1998      |                                  | 1998         |           |            |

Header Data





# What is header data?

| Header Area |                |                |           |                                  |                    |
|-------------|----------------|----------------|-----------|----------------------------------|--------------------|
|             | Name           | Descriptn      | Selection | Characteristic Value             | Ext. Display       |
|             | Center         | BA             | 21        | Ames Research Center             |                    |
|             | Budget Year    | Budget Year    | 2000      |                                  | 2000               |
|             | Agency Version | Agency Version | A001      |                                  | Pre-POP            |
|             | Center Version | Center Version | C001      |                                  | C001               |
|             | Service Pool   | Pool           | IT        |                                  | INFO TECH SERVICES |
|             | Organization   | NASA Org       | 21JT      | Applied Information Technolog... |                    |
|             | Fiscal Year    | Fiscal year    | 1998      |                                  | 1998               |

**Header data is the data that you want to pull from the database and plan. In the Service Pool Secondary Travel \$ Distribution Planning Folder, the data that you specify is the following:**

**Center**  
**Budget Year**  
**Agency Version**

The Center for which you are planning  
 The Budget year you are planning  
 The Agency Version you are working in (A001= Center PrePOP, A002= Center POP, A003 = Enterprise Review, A004=Agency Review, A005 = OMB Submit, A006 = Congressional Submit)

**Center Version**  
**Service Pool**  
**Organization**  
**Fiscal Year**

The Center Version you are working in (C001-C005)  
 The service pool from which FTEs are distributed  
 NASA organization from which FTEs are distributed  
 The fiscal year you are working in (Budget Year – 2)  
 (used for phasing layouts and delta layouts)





# What goes in the Input Layout?

| FTE Annual Input Layout - Input Area |         |                      |                  |                  |              |              |              |              |              |              |  |
|--------------------------------------|---------|----------------------|------------------|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--|
| FTE (Annual)                         |         | FTE (Annual) - Delta |                  |                  |              |              |              |              |              |              |  |
| Recompute                            |         | Refresh FTE Rates    |                  | Check Bus. Rules |              |              |              |              |              |              |  |
| <div> </div>                         |         |                      |                  |                  |              |              |              |              |              |              |  |
| Guide Type                           | OG Type | Sub-Pool             |                  | FY 1998 FTEs     | FY 1999 FTEs | FY 2000 FTEs | FY 2001 FTEs | FY 2002 FTEs | FY 2003 FTEs | FY 2004 FTEs |  |
| INGUIDE                              | #       | DESKTOP              | DESKTOP SERVICES | 2.0              | 2.0          | 2.0          | 2.0          | 2.0          | 2.0          | 2.0          |  |
| INGUIDE                              | #       | ITSYSTEMS            | ITSYSTEMS        | 16.7             | 33.0         | 33.0         | 33.0         | 33.0         | 33.0         | 33.0         |  |
| INGUIDE                              | #       | PHONE                | PHONE            | 2.3              | 2.3          | 2.3          | 2.3          | 2.3          | 2.3          | 2.3          |  |

1) Click the append row button to add row.

2) Enter the following

**Guide Type** Inguide or Overguide

**OG Type** Overguide type: For Inguide data, always use the unassigned (#) value. For Overguide data, options are New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**Sub-Pool** List of sub-pools for a Service Pool.

**FTEs per Year** Enter FTEs for two previous years, the budget year and four outyears

3) Click the Refresh/Resort button to sort the row of data that you entered.

4) Click the Recompute button to update the sub-pool FTEs and costs.

5) Repeat for all of the sub-pools that you are responsible for.





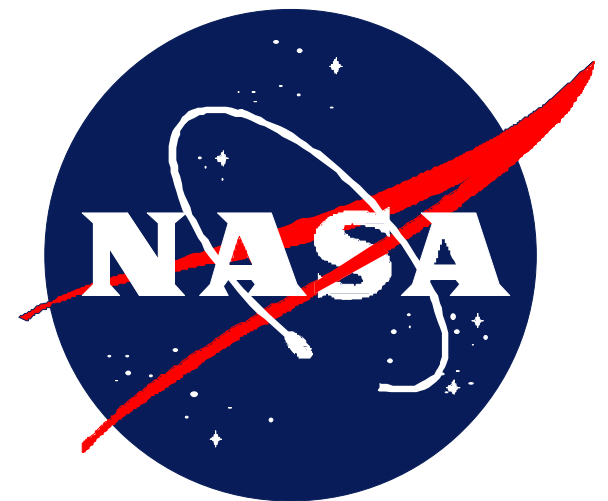
# Where can I see the output?

## FTE and \$ (Annual) Output Layout

| FTE \$ (Annual) |  | FTE (Phase) |  | FTE \$ (Phase) |  | FTE \$ (Phase) - Incremental |  | FTE \$ (Phase) - Cumulative |  |  |  |
|-----------------|--|-------------|--|----------------|--|------------------------------|--|-----------------------------|--|--|--|
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|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |
|                 |  |             |  |                |  |                              |  |                             |  |  |  |



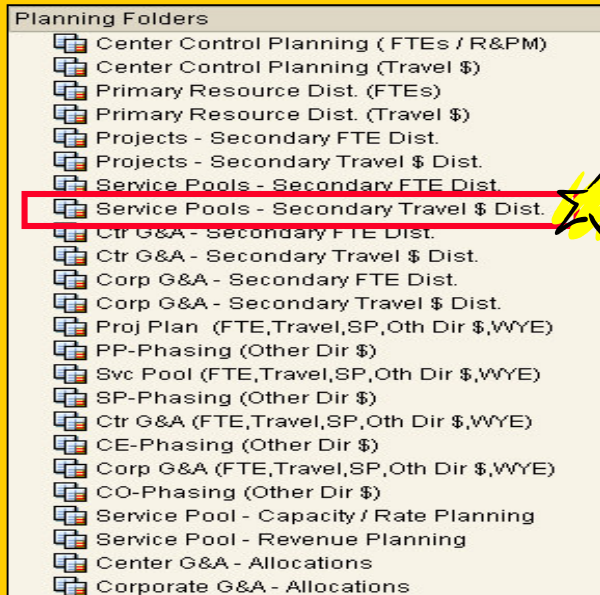
# Secondary Travel Dollar Distribution







# Process Flow: Service Pool Secondary Travel \$



In the Service Pool Secondary Travel \$ folder, the Service Pool Authorizer will distribute Travel \$ to Pools.



## Distributing Annual Travel Dollars to Sub-pools

- **Goal:** Take the annual Service Pool Travel \$ Control Total and distribute it to the Sub-pools within the Service Pool.

- **Steps:** Entering header data:
  1. Log On
  2. Open Service Pools – Secondary Travel \$ Dist Folder
  3. Enter Header Data
  4. Click on Travel \$ (Annual) Button







# Service Pools – Secondary Travel \$ Dist

## Travel \$ Annual Input Layout

Planning Folder Edit Goto System Help SAP

---

**Execute Service Pools - Secondary Travel \$ Dist**

| Name           | Descriptn      | Selection | Characteristic Value Ext. Display | Selection | CharVal... |
|----------------|----------------|-----------|-----------------------------------|-----------|------------|
| Center         | BA             | 21        | Ames Research Center              |           |            |
| Budget Year    | Budget Year    | 2000      | 2000                              |           |            |
| Agency Version | Agency Version | A001      | Pre-POP                           |           |            |
| Center Version | Center Version | C001      | C001                              |           |            |
| Service Pool   | Pool           | IT        | INFO TECH SERVICES                |           |            |
| Organization   | NASA Org       | 21JT      | Applied Information Technolog...  |           |            |
| Fiscal Year    | Fiscal year    | 1998      | 1998                              |           |            |

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules

Travel \$ (Annual) Travel \$ (Annual) - Delta

Refresh Travel \$ Check Bus. Rules

| Guide Type | OG Type | Sub-Pool  | Total     |
|------------|---------|-----------|-----------|
| INGUIDE    | #       | ITSYSTEMS | ITSYSTEMS |
| INGUIDE    | OG Type | Sub-Pool  | Total     |
| Guide Type | OG Type | Sub-Pool  | Total     |

Travel \$ (Annual) Travel \$ (Phone) Travel \$

| Guide Type | OG Type | Sub-Pool  | Total     |
|------------|---------|-----------|-----------|
| INGUIDE    | #       | ITSYSTEMS | ITSYSTEMS |
| INGUIDE    | OG Type | Sub-Pool  | Total     |
| Guide Type | OG Type | Sub-Pool  | Total     |

| Name           | Descriptn      | Selection | Characteristic Value Ext. Display | Selection | CharVal... |
|----------------|----------------|-----------|-----------------------------------|-----------|------------|
| Center         | BA             | 21        | Ames Research Center              |           |            |
| Budget Year    | Budget Year    | 2000      | 2000                              |           |            |
| Agency Version | Agency Version | A001      | Pre-POP                           |           |            |
| Center Version | Center Version | C001      | C001                              |           |            |
| Service Pool   | Pool           | IT        | INFO TECH SERVICES                |           |            |
| Organization   | NASA Org       | 21JT      | Applied Information Technolog...  |           |            |
| Fiscal Year    | Fiscal year    | 1998      | 1998                              |           |            |

2.000 28.700 28.700 28.700 28.700 28.700 28.700

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Header Data



# What is header data?

| Header Area    |                |           |                                  |              |
|----------------|----------------|-----------|----------------------------------|--------------|
| Name           | Descriptn      | Selection | Characteristic Value             | Ext. Display |
| Center         | BA             | 21        | Ames Research Center             |              |
| Budget Year    | Budget Year    | 2000      |                                  | 2000         |
| Agency Version | Agency Version | A001      |                                  | Pre-POP      |
| Center Version | Center Version | C001      |                                  | C001         |
| Service Pool   | Pool           | IT        | INFO TECH SERVICES               |              |
| Organization   | NASA Org       | 21JT      | Applied Information Technolog... |              |
| Fiscal Year    | Fiscal year    | 1998      |                                  | 1998         |

**Header data is the data that you want to pull from the database and plan. In the Service Pool Secondary Travel \$ Distribution Planning Folder, the data that you specify is the following:**

|                       |   |
|-----------------------|---|
| <b>Center</b>         | The Center for which you are planning   |
| <b>Budget Year</b>    | The Budget year you are planning  |
| <b>Agency Version</b> | The Agency Version you are working in (A001= Center PrePOP, A002= Center POP, A003 = Enterprise Review, A004=Agency Review, A005 = OMB Submit, A006 = Congressional Submit) |
| <b>Center Version</b> | The Center Version you are working in (C001-C005)   |
| <b>Service Pool</b>   | The service pool from which FTEs are distributed  |
| <b>Organization</b>   | NASA organization from which FTEs are distributed   |
| <b>Fiscal Year</b>    | The fiscal year you are working in (Budget Year – 2)<br>(used for phasing layouts and delta layouts)  |





# What goes in the Input Layout?











| Travel \$ Annual Input Layout - Input Area |         |                            |           |            |            |            |            |            |            |            |  |
|--|---------|----------------------------|-----------|------------|------------|------------|------------|------------|------------|------------|--|
| Travel \$ (Annual)                         |         | Travel \$ (Annual) - Delta |           |            |            |            |            |            |            |            |  |
| Refresh Travel \$                          |         | Check Bus. Rules           |           |            |            |            |            |            |            |            |  |
|  |         |                            |           |            |            |            |            |            |            |            |  |
| Guide Type                                 | OG Type | Sub-Pool                   |           | FY 1998 \$ | FY 1999 \$ | FY 2000 \$ | FY 2001 \$ | FY 2002 \$ | FY 2003 \$ | FY 2004 \$ |  |
| INGUIDE                                    | #       | ITSYSTEMS                  | ITSYSTEMS | 2.000      | 28.700     | 28.700     | 28.700     | 28.700     | 28.700     | 28.700     |  |
| INGUIDE                                    | OG Type | Sub-Pool                   | Total     | 2.000      | 28.700     | 28.700     | 28.700     | 28.700     | 28.700     | 28.700     |  |
| Guide Type                                 | OG Type | Sub-Pool                   | Total     | 2.000      | 28.700     | 28.700     | 28.700     | 28.700     | 28.700     | 28.700     |  |

- 1) Click the append row button to add a row.
- 2) Enter the following:
  - Guide Type** Inguide or Overguide
  - OG Type** Overguide type: For Inguide data, always use the unassigned (#) value. For Overguide data, options are New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).
  - Sub-Pool** List of sub-pools for a Service Pool.
  - FTEs per Year** Enter Travel dollars for two previous years, the budget year and four outyears
- 3) Click the Refresh/Resort button to sort the row of data that you entered.
- 4) Click the Recompute button to update the sub-pool Travel dollars.
- 5) Repeat for all of the sub-pools that you are responsible for.





# Where can I see the output?

| Travel \$ (Annual) Output Layout  |   |                   |           |                                 |            |            |                                |            |            |            |            |
|---|---|-------------------|-----------|---------------------------------|------------|------------|--------------------------------|------------|------------|------------|------------|
| Travel \$ (Annual)  |   | Travel \$ (Phase) |           | Travel \$ (Phase) - Incremental |            |            | Travel \$ (Phase) - Cumulative |            |            |            |            |
|   |   |                   |           |                                 |            |            |                                |            |            |            |            |
| <div></div> |   |                   |           |                                 |            |            |                                |            |            |            |            |
|    | Guide Type  | OG Type           | Sub-Pool  |                                 | FY 1998 \$ | FY 1999 \$ | FY 2000 \$                     | FY 2001 \$ | FY 2002 \$ | FY 2003 \$ | FY 2004 \$ |
|   | INGUIDE  | #                 | ITSYSTEMS | ITSYSTEMS                       | 2.000      | 28.700     | 28.700                         | 28.700     | 28.700     | 28.700     | 28.700     |
|   | INGUIDE   | OG Type           | Sub-Pool  | Total                           | 2.000      | 28.700     | 28.700                         | 28.700     | 28.700     | 28.700     | 28.700     |
|   | Guide Type  | OG Type           | Sub-Pool  | Total                           | 2.000      | 28.700     | 28.700                         | 28.700     | 28.700     | 28.700     | 28.700     |

1) Click the Travel \$ (Annual) output button to view the output area.

2) The following information is shown:

**Guide Type** Inguide or Overguide

**OG Type** Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**Sub-Pool** The sub-pool assigned to the Travel dollars.

**FY 20XX \$** Travel dollars for two previous years, the budget year, and four outyears





## Secondary FTE & Travel \$ Distro. – Debrief

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- The previous section demonstrated how to accomplish secondary FTE and Travel dollar distribution.
- The next section will briefly discuss Business Rules & Version Control, followed by Service Pool Authorizer exercises covering FTE and Travel dollar distribution.





# Business Rules

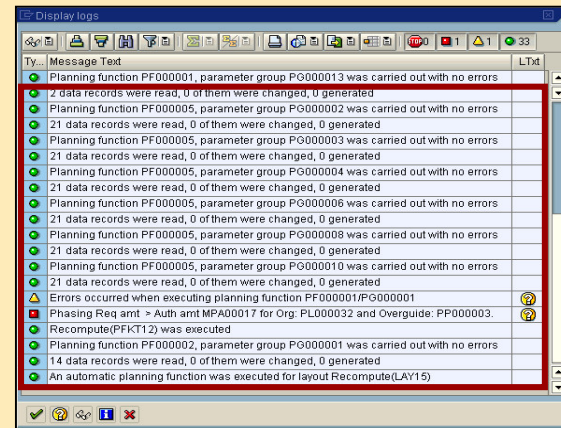




# Business Rules Display

**FYI!** Business Rules are application checks that verify data within the system. For example, business rules advise end-users if Authorized FTEs match Requested FTEs before being copied to the final version.

- Once you click on the Check ALL Bus. Rules, the list of business rules will appear.



The Business Rules will be categorized and totaled Red, Yellow, Green and Stop.



**Stop** – Prohibits you from proceeding



**Red** – Business Rule failed



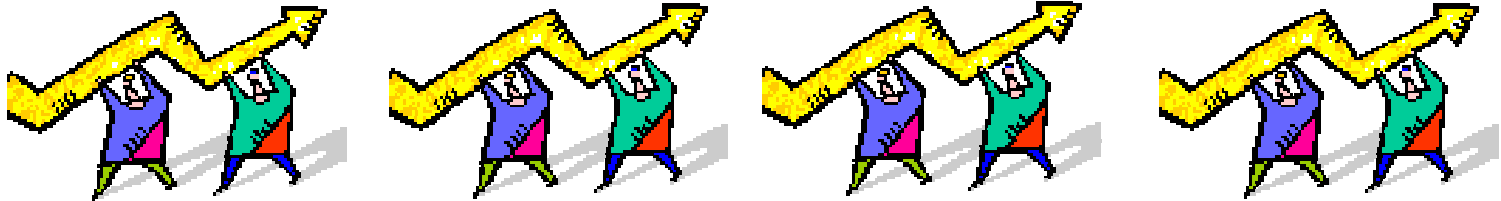
**Yellow** – Business Rule warned



**Green** – Business Rule passed



# Version Control







# Agency and Center Version Control

| BUDGET CYCLE ACTIVITY | AGENCY VERSION | CENTER VERSION                       |   | CENTER SUBMIT VERSIONS              |   |
|-----------------------|----------------|--------------------------------------|---|-------------------------------------|---|
| Center Pre-POP        | A001           | C001<br>C002<br>C003<br>C004<br>C005 | Baseline budget data carried over from previous year<br>Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity.<br>Project/Pool negotiations. Allocation of excess from Pools to Projects.<br>Cost finalization and Final Center Director Approval.<br>Code X area for strategic planning and "what-if" scenarios. | CENTER DRAFT SUBMIT<br>VERSION C000 | CENTER SUBMIT VERSION TO<br>HEADQUARTERS C999 |
| Center POP            | A002           | C001<br>C002<br>C003<br>C004<br>C005 | Baseline budget data carried over from previous year<br>Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity.<br>Project/Pool negotiations. Allocation of excess from Pools to Projects.<br>Cost finalization and Final Center Director Approval.<br>Code X area for strategic planning and "what-if" scenarios. |                                     |   |
| Enterprise POP        | A003           |                                      | Enterprise balancing; no center input unless enterprise requests changes or rebalancing required due to Enterprise modifications.   |                                     |   |
| Agency POP            | A004           |                                      | Agency balancing; no center input unless enterprise/Code B requests changes or rebalancing required due to modifications.   |                                     |   |
| OMB Submit            | A005           |                                      | No Center input   |                                     |   |
| Congressional Submit  | A006           |                                      | No Center input   |                                     |   |





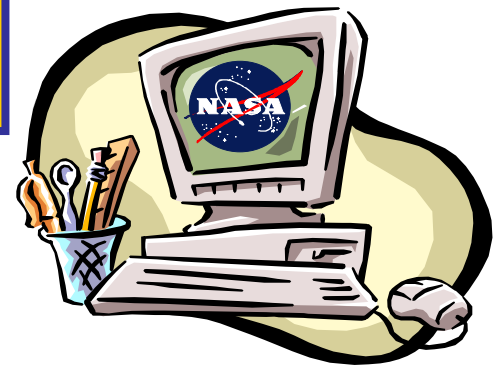
## Exercises: FTE and Travel \$ Distro.

---

**Annual Scenario:** You are a Service Pool Authorizer for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing the civil service full-time equivalents (FTEs) and Travel \$ to the appropriate Pools. Your control totals have already been distributed in the Primary Distribution exercise.

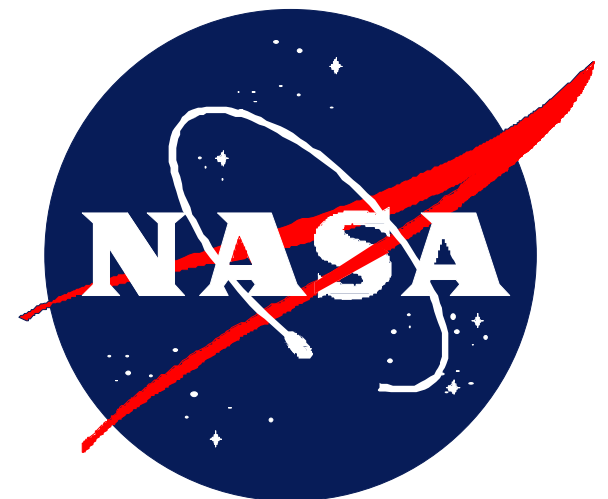


Using your exercise handout, go to  
***Service Pool Authorizer: FTE and Travel \$  
(steps 1-15) Distributions***





# Service Pool Requester







## Distributing FTEs, Travel \$, SP Units, Other Direct \$, and WYEs

---

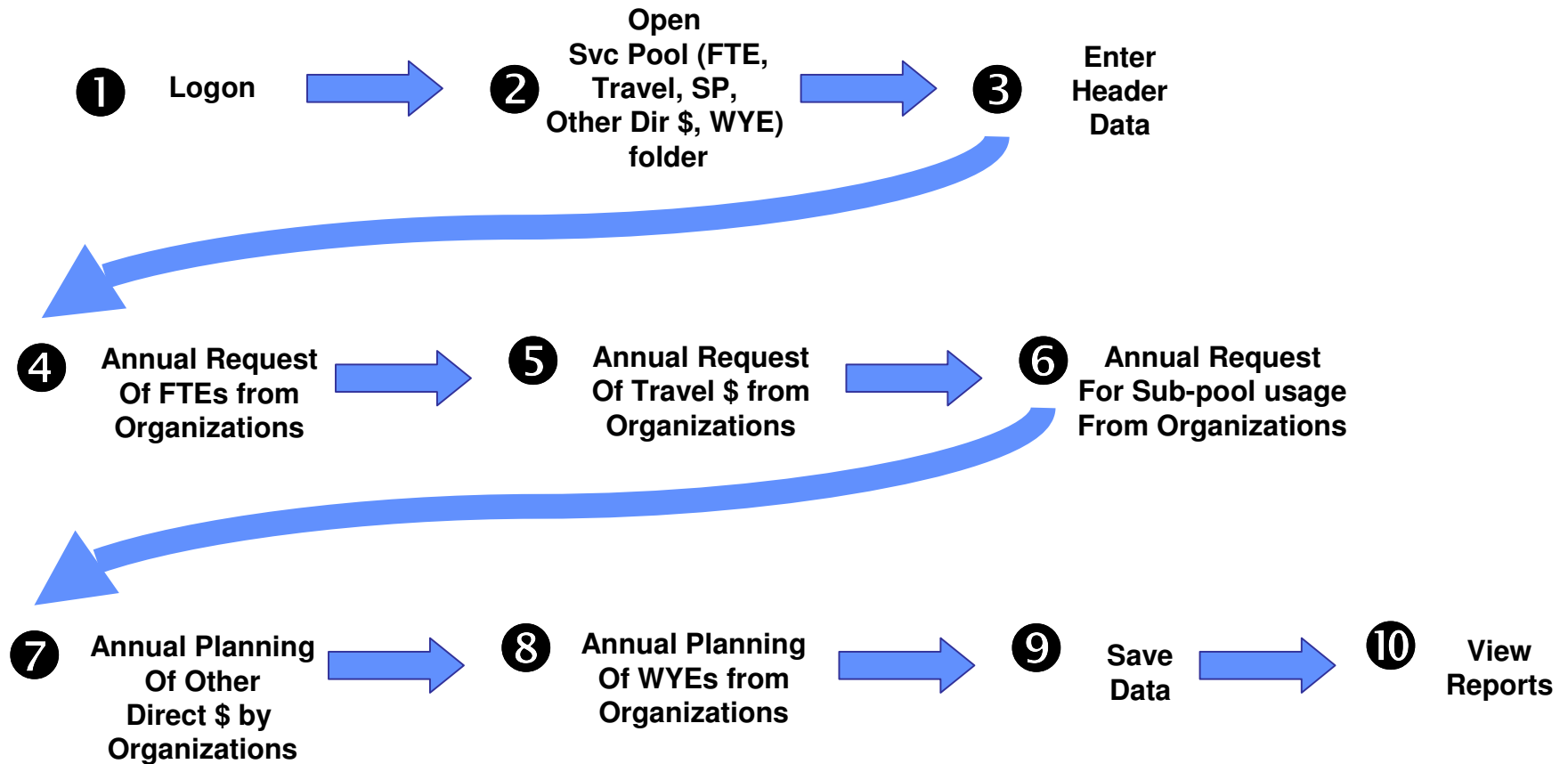
- **Goal:** The section of Service Pool Requester will examine distributing FTEs, Travel \$, Service Pool Units, Other Direct \$, and WYEs to the Service Pools.







# Process Flow (Annual Planning)





- **Goal:** Request FTEs from organizations to staff Service Pools.

- **Steps:** Entering header data:

1. Log On
2. Enter Header Data
3. Open Svc Pool (FTE, Travel, SP, Other Dir \$, WYE) folder.
4. Enter Header Data
5. Click on FTE (Annual) Button







# Svc Pool (FTE, Travel, SP, Other Dir \$, WYE)

## FTE (Annual) Input Layout

Planning Folder Edit Goto System Help

Execute Svc Pool (FTE, Travel, SP, Oth Dir \$, WYE)

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules SEM TEAM USE ONLY

FTE (Annual) FTE(Annual) - Delta Travel \$ (Annual)

Recompute Prime (Req=Auth) Refresh FTE P

| Name of Variab... | Descriptn      | Selection | Char. value ext.     |
|-------------------|----------------|-----------|----------------------|
| Center            | BA             | 21        | Ames Research Center |
| Budget Year       | Budget Year    | 2000      | 2000                 |
| Agency Version    | Agency Version | A001      | Pre-POP              |
| Center Version    | Center Version | C001      | C001                 |
| Service Pool      | Pool           | IT        | INFO TECH SERVICES   |
| Service Sub-Pool  | Sub-Pool       | ITSYS...  | ITSYSTEMS            |
| Fiscal Year       | Fiscal year    | 1998      | 1998                 |

FTE and \$ (Annual) Travel \$ (Annual) SP Units

| Source | Detail | DIR/OTH | Guide Type | OG Type | NASA Org |
|--------|--------|---------|------------|---------|----------|
| DIRECT | #      | OTHER   | INGUIDE    | #       | 21J      |
| DIRECT | #      | OTHER   | INGUIDE    | OG Type | NASA     |

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Header Data



# What is header data?

| Header Area    |                |           |                                  |              |
|----------------|----------------|-----------|----------------------------------|--------------|
| Name           | Descriptn      | Selection | Characteristic Value             | Ext. Display |
| Center         | BA             | 21        | Ames Research Center             |              |
| Budget Year    | Budget Year    | 2000      |                                  | 2000         |
| Agency Version | Agency Version | A001      |                                  | Pre-POP      |
| Center Version | Center Version | C001      |                                  | C001         |
| Service Pool   | Pool           | IT        | INFO TECH SERVICES               |              |
| Organization   | NASA Org       | 21JT      | Applied Information Technolog... |              |
| Fiscal Year    | Fiscal year    | 1998      |                                  | 1998         |

**Header data is the data that you want to pull from the database and plan. In the Service Pool Secondary Travel \$ Distribution Planning Folder, the data that you specify is the following:**

|                       |   |
|-----------------------|---|
| <b>Center</b>         | The Center for which you are planning   |
| <b>Budget Year</b>    | The Budget year you are planning  |
| <b>Agency Version</b> | The Agency Version you are working in (A001= Center PrePOP, A002= Center POP, A003 = Enterprise Review, A004=Agency Review, A005 = OMB Submit, A006 = Congressional Submit) |
| <b>Center Version</b> | The Center Version you are working in (C001-C005)   |
| <b>Service Pool</b>   | The service pool from which FTEs are distributed  |
| <b>Organization</b>   | NASA organization from which FTEs are distributed   |
| <b>Fiscal Year</b>    | The fiscal year you are working in (Budget Year – 2)<br>(used for phasing layouts and delta layouts)  |





# What goes in the Input Layout?

| FTE Annual Input Layout - Input Area  |                     |                    |                            |                                    |                           |                       |                          |              |              |              |    |
|---|---------------------|--------------------|----------------------------|------------------------------------|---------------------------|-----------------------|--------------------------|--------------|--------------|--------------|----|
| FTE (Annual)  | FTE(Annual) - Delta | Travel \$ (Annual) | Travel \$ (Annual) - Delta | SP Units (Annual)                  | SP Units (Annual) - Delta | Other Dir \$ (Annual) | Version Control: Restore |              |              |              |    |
| <div> <div>Recompute</div> <div>Prime (Req=Auth)</div> <div>Refresh FTE Rate</div> <div>Check Bus. Rules</div> </div>     |                     |                    |                            |                                    |                           |                       |                          |              |              |              |    |
| <div> <div>Append Row</div> <div>Delete Row</div> <div>Save</div> <div>Print</div> <div>Help</div> <div>Exit</div> </div> |                     |                    |                            |                                    |                           |                       |                          |              |              |              |    |
| DIR/OTH   | Guide Type          | OG Type            | NASA Org                   |                                    | LC                        | FY 1998 FTEs          | FY 1999 FTEs             | FY 2000 FTEs | FY 2001 FTEs | FY 2002 FTEs | FY |
| OTHER   | INGUIDE             | #                  | 21JT                       | Applied Information Technology Div | #                         | 16.7                  | 33.0                     | 33.0         | 33.0         | 33.0         |    |
| OTHER   | INGUIDE             | OG Type            | NASA Org                   | Total                              | LC                        | 16.7                  | 33.0                     | 33.0         | 33.0         | 33.0         |    |
| OTHER   | Guide Type          | OG Type            | NASA Org                   | Total                              | LC                        | 16.7                  | 33.0                     | 33.0         | 33.0         | 33.0         |    |
| DIR/OTH   | Guide Type          | OG Type            | NASA Org                   | Total                              | LC                        | 16.7                  | 33.0                     | 33.0         | 33.0         | 33.0         |    |

1) Click the append row button to add a row.

2) Enter the following:

**DIR/OTH**

Direct or Other (Direct FTEs are used by projects, Other FTEs remain in the pool).

**Guide Type**

Inguide or Overguide

**OG Type**

Overguide type: For Inguide data, always use the unassigned (#) value. For Overguide data, options are New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**NASA Org**

The organization requesting FTEs.

**LC**

Labor Category

**FY 20XX FTEs**

Enter FTEs for two previous years, the budget year and four outyears






# What goes in the Input Layout? (Cont.)

| FTE Annual Input Layout - Input Area   |            |                     |          |                                    |    |                            |              |                   |              |                       |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
|--|------------|---------------------|----------|------------------------------------|----|----------------------------|--------------|-------------------|--------------|-----------------------|----|---------|------------|---------|----------|--|----|--------------|--------------|--------------|--------------|--------------|----|-------|---------|---|------|------------------------------------|---|------|------|------|------|------|--|-------|---------|---------|----------|-------|----|------|------|------|------|------|--|-------|------------|---------|----------|-------|----|------|------|------|------|------|--|---------|------------|---------|----------|-------|----|------|------|------|------|------|--|
| FTE (Annual)   |            | FTE(Annual) - Delta |          | Travel \$ (Annual)                 |    | Travel \$ (Annual) - Delta |              | SP Units (Annual) |              | Other Dir \$ (Annual) |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
| <div> <span>Recompute</span> <span>Prime (Req=Auth)</span> <span>Refresh FTE Rate</span> <span>Check Bus. Rules</span> </div>  |            |                     |          |                                    |    |                            |              |                   |              |                       |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
| <table border="1"> <thead> <tr> <th>DIR/OTH</th> <th>Guide Type</th> <th>OG Type</th> <th>NASA Org</th> <th></th> <th>LC</th> <th>FY 1998 FTEs</th> <th>FY 1999 FTEs</th> <th>FY 2000 FTEs</th> <th>FY 2001 FTEs</th> <th>FY 2002 FTEs</th> <th>FY</th> </tr> </thead> <tbody> <tr> <td>OTHER</td> <td>INGUIDE</td> <td>#</td> <td>21JT</td> <td>Applied Information Technology Div</td> <td>#</td> <td>16.7</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td></td> </tr> <tr> <td>OTHER</td> <td>INGUIDE</td> <td>OG Type</td> <td>NASA Org</td> <td>Total</td> <td>LC</td> <td>16.7</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td></td> </tr> <tr> <td>OTHER</td> <td>Guide Type</td> <td>OG Type</td> <td>NASA Org</td> <td>Total</td> <td>LC</td> <td>16.7</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td></td> </tr> <tr> <td>DIR/OTH</td> <td>Guide Type</td> <td>OG Type</td> <td>NASA Org</td> <td>Total</td> <td>LC</td> <td>16.7</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td>33.0</td> <td></td> </tr> </tbody> </table> |            |                     |          |                                    |    |                            |              |                   |              |                       |    | DIR/OTH | Guide Type | OG Type | NASA Org |  | LC | FY 1998 FTEs | FY 1999 FTEs | FY 2000 FTEs | FY 2001 FTEs | FY 2002 FTEs | FY | OTHER | INGUIDE | # | 21JT | Applied Information Technology Div | # | 16.7 | 33.0 | 33.0 | 33.0 | 33.0 |  | OTHER | INGUIDE | OG Type | NASA Org | Total | LC | 16.7 | 33.0 | 33.0 | 33.0 | 33.0 |  | OTHER | Guide Type | OG Type | NASA Org | Total | LC | 16.7 | 33.0 | 33.0 | 33.0 | 33.0 |  | DIR/OTH | Guide Type | OG Type | NASA Org | Total | LC | 16.7 | 33.0 | 33.0 | 33.0 | 33.0 |  |
| DIR/OTH  | Guide Type | OG Type             | NASA Org |                                    | LC | FY 1998 FTEs               | FY 1999 FTEs | FY 2000 FTEs      | FY 2001 FTEs | FY 2002 FTEs          | FY |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
| OTHER  | INGUIDE    | #                   | 21JT     | Applied Information Technology Div | #  | 16.7                       | 33.0         | 33.0              | 33.0         | 33.0                  |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
| OTHER  | INGUIDE    | OG Type             | NASA Org | Total                              | LC | 16.7                       | 33.0         | 33.0              | 33.0         | 33.0                  |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
| OTHER  | Guide Type | OG Type             | NASA Org | Total                              | LC | 16.7                       | 33.0         | 33.0              | 33.0         | 33.0                  |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |
| DIR/OTH  | Guide Type | OG Type             | NASA Org | Total                              | LC | 16.7                       | 33.0         | 33.0              | 33.0         | 33.0                  |    |         |            |         |          |  |    |              |              |              |              |              |    |       |         |   |      |                                    |   |      |      |      |      |      |  |       |         |         |          |       |    |      |      |      |      |      |  |       |            |         |          |       |    |      |      |      |      |      |  |         |            |         |          |       |    |      |      |      |      |      |  |

- 3) Click the Refresh/Resort button to sort the row of data that you entered.
- 4) Click the Recompute button to update the sub-pool FTE requests.
- 5) Click the Refresh FTE Rate button to pull the current FTE rate. This updates the FTE dollars in the output layout.
- 6) Repeat for all of the sub-pools that you are responsible for.

**Note:** You could also pre-populate the FTE requests from the authorized FTE quantity by

Clicking the  button. Pressing this button will populate the FTE requests from Authorized FTE amounts in the C000 version.








# Where can I see the output?

## FTE and \$ (Annual) Output Layout

| FTE and \$ (Annual)   |        |        |         |            |         |          |                                    | Travel \$ (Annual) |              | SP Units and \$ (Annual) |              | Other Dir \$ (Annual) |              | W/YE (Annual) |  | FTE and \$ (Phase) |  | Travel \$ (Phase) |  | SP Units a |  |
|---|--------|--------|---------|------------|---------|----------|------------------------------------|--------------------|--------------|--------------------------|--------------|-----------------------|--------------|---------------|--|--------------------|--|-------------------|--|------------|--|
|   |        |        |         |            |         |          |                                    |                    |              |                          |              |                       |              |               |  |                    |  |                   |  |            |  |
|  | Source | Detail | DIR/OTH | Guide Type | OG Type | NASA Org |                                    | LC                 | FY 1998 FTEs | FY 1998 \$               | FY 1999 FTEs | FY 1999 \$            | FY 2000 FTEs | FY 2000 \$    |  |                    |  |                   |  |            |  |
|   | DIRECT | #      | OTHER   | INGUIDE    | #       | 21JT     | Applied Information Technology Div | #                  | 16.7         | 1,945.550                | 33.0         | 4,052.433             | 33.0         | 4,215.783     |  |                    |  |                   |  |            |  |
|   | DIRECT | #      | OTHER   | INGUIDE    | OG Type | NASA Org | Total                              | LC                 | 16.7         | 1,945.550                | 33.0         | 4,052.433             | 33.0         | 4,215.783     |  |                    |  |                   |  |            |  |
|   | DIRECT | #      | OTHER   | Guide Type | OG Type | NASA Org | Total                              | LC                 | 16.7         | 1,945.550                | 33.0         | 4,052.433             | 33.0         | 4,215.783     |  |                    |  |                   |  |            |  |
|   | DIRECT | Detail | DIR/OTH | Guide Type | OG Type | NASA Org | Total                              | LC                 | 16.7         | 1,945.550                | 33.0         | 4,052.433             | 33.0         | 4,215.783     |  |                    |  |                   |  |            |  |
|   | Source | Detail | DIR/OTH | Guide Type | OG Type | NASA Org | Total                              | LC                 | 16.7         | 1,945.550                | 33.0         | 4,052.433             | 33.0         | 4,215.783     |  |                    |  |                   |  |            |  |

1) Click the FTE and \$ (Annual) output button to view the output area.

2) The following information is shown:

### Source

Source of Planned FTEs: Direct = Planned by YOU. Other Sources are other Service Pools, identified by the pool name in this column.

### Detail

Detail of the Source: the detail for Direct is always #. Other details are service sub-pools, identified by the sub-pool name in this column.

### DIR/OTH

Direct or Other (Direct FTEs are used by projects, Other FTEs remain in the pool).

### Guide Type

Inguide or Overguide

### OG Type

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).





# Where can I see the output? (Cont.)

## FTE and \$ (Annual) Output Layout

| FTE and \$ (Annual) |        | Travel \$ (Annual) |         | SP Units and \$ (Annual) |         | Other Dir \$ (Annual) |                                      | WYE (Annual) |              | FTE and \$ (Phase) |              | Travel \$ (Phase) |              | SP Units a |  |
|---------------------|--------|--------------------|---------|--------------------------|---------|-----------------------|--------------------------------------|--------------|--------------|--------------------|--------------|-------------------|--------------|------------|--|
|                     | Source | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              |                                      | LC           | FY 1998 FTEs | FY 1998 \$         | FY 1999 FTEs | FY 1999 \$        | FY 2000 FTEs | FY 2000 \$ |  |
|                     | DIRECT | #                  | OTHER   | INGUIDE                  | #       | 21JT                  | Applied Information Technology Div # |              | 16.7         | 1,945.550          | 33.0         | 4,052.433         | 33.0         | 4,215.780  |  |
|                     | DIRECT | #                  | OTHER   | INGUIDE                  | OG Type | NASA Org              | Total                                | LC           | 16.7         | 1,945.550          | 33.0         | 4,052.433         | 33.0         | 4,215.780  |  |
|                     | DIRECT | #                  | OTHER   | Guide Type               | OG Type | NASA Org              | Total                                | LC           | 16.7         | 1,945.550          | 33.0         | 4,052.433         | 33.0         | 4,215.780  |  |
|                     | DIRECT | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              | Total                                | LC           | 16.7         | 1,945.550          | 33.0         | 4,052.433         | 33.0         | 4,215.780  |  |
|                     | Source | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              | Total                                | LC           | 16.7         | 1,945.550          | 33.0         | 4,052.433         | 33.0         | 4,215.780  |  |

3) The following information is shown (continued):

**NASA Org**

The organization requesting FTEs.

**LC**

Labor Category

**FY 20XX FTEs**

FTEs for two previous years, the budget year, and four outyears

**FY 20XX \$**

Labor dollars for two previous years, the budget year, and four outyears

**Note: You will not see Labor costs in this output view unless you first push the “Refresh**

**FTE Rate”**



**planning function in the input area.**







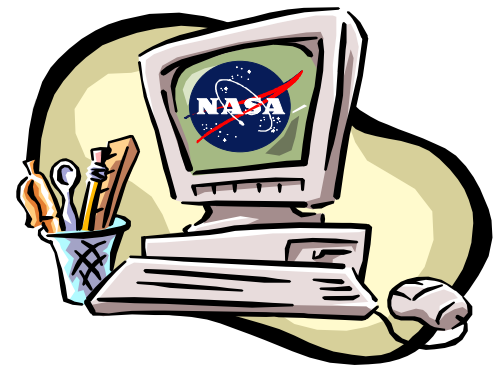
## Exercise: Requesting FTEs

---

**Annual Scenario:** You are a Service Pool Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing civil service full-time equivalents (FTEs) to the appropriate Pools.



Using your exercise handout, go to  
***Service Pool Requester: Requesting FTEs***  
***(steps 1-7)***





## Requesting Travel \$

- **Goal:** Request Travel Dollars from organizations to be used by Service Pools.

- **Steps:** Entering header data:

1. Log On
2. Enter Header Data
3. Open Svc Pool (FTE, Travel, SP, Other Dir \$, WYE) folder.
4. Enter Header Data
5. Click on Travel \$ (Annual) Button







# What goes in the Input Layout?

| Travel \$ Annual Input Layout - Input Area |            |                     |          |                                    |            |                            |            |                   |            |                           |            |                       |
|--|------------|---------------------|----------|------------------------------------|------------|----------------------------|------------|-------------------|------------|---------------------------|------------|-----------------------|
| FTE (Annual)                               |            | FTE(Annual) - Delta |          | Travel \$ (Annual)                 |            | Travel \$ (Annual) - Delta |            | SP Units (Annual) |            | SP Units (Annual) - Delta |            | Other Dir \$ (Annual) |
| Recompute                                  |            | Prime (Req = Auth)  |          | Check Bus. Rules                   |            |                            |            |                   |            |                           |            |                       |
| <div> </div>                               |            |                     |          |                                    |            |                            |            |                   |            |                           |            |                       |
| DIR/OTH                                    | Guide Type | OG Type             | NASA Org |                                    | FY 1998 \$ | FY 1999 \$                 | FY 2000 \$ | FY 2001 \$        | FY 2002 \$ | FY 2003 \$                | FY 2004 \$ |                       |
| OTHER                                      | INGUIDE    | #                   | 21JT     | Applied Information Technology Div | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     |                       |
| OTHER                                      | INGUIDE    | OG Type             | NASA Org | Total                              | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     |                       |
| OTHER                                      | Guide Type | OG Type             | NASA Org | Total                              | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     |                       |
| DIR/OTH                                    | Guide Type | OG Type             | NASA Org | Total                              | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     |                       |

1) Click the append row button to add a row.

2) Enter the following:

**DIR/OTH**

Direct or Other (Direct Travel dollars are used by projects, Other Travel dollars remain in the pool).

**Guide Type**

Inguide or Overguide

**OG Type**

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**NASA Org**

The organization from which Travel dollars are being requested.



# What goes in the Input Layout? (Cont.)

## Travel \$ Annual Input Layout - Input Area

| FTE (Annual)  |            | FTE (Annual) - Delta |          | Travel \$ (Annual)                 |            | Travel \$ (Annual) - Delta |            | SP Units (Annual) |            | SP Units (Annual) - Delta |            | Other Dir \$ (Annual) |  |
|---|------------|----------------------|----------|------------------------------------|------------|----------------------------|------------|-------------------|------------|---------------------------|------------|-----------------------|--|
| <input type="button" value="Recompute"/> <input type="button" value="Prime (Req = Auth)"/> <input type="button" value="Check Bus. Rules"/>  |            |                      |          |                                    |            |                            |            |                   |            |                           |            |                       |  |
| <input type="button" value="Save"/> <input type="button" value="Print"/> <input type="button" value="Refresh"/> <input type="button" value="Delete"/> <input type="button" value="Undo"/> <input type="button" value="Redo"/> |            |                      |          |                                    |            |                            |            |                   |            |                           |            |                       |  |
| DIR/OTH   | Guide Type | OG Type              | NASA Org |                                    | FY 1998 \$ | FY 1999 \$                 | FY 2000 \$ | FY 2001 \$        | FY 2002 \$ | FY 2003 \$                | FY 2004 \$ |                       |  |
| OTHER   | INGUIDE    | #                    | 21JT     | Applied Information Technology Div | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     | 28.700                |  |
| OTHER   | INGUIDE    | OG Type              | NASA Org | Total                              | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     | 28.700                |  |
| OTHER   | Guide Type | OG Type              | NASA Org | Total                              | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     | 28.700                |  |
| DIR/OTH   | Guide Type | OG Type              | NASA Org | Total                              | 2.000      | 28.700                     | 28.700     | 28.700            | 28.700     | 28.700                    | 28.700     | 28.700                |  |

- 2) Enter the following (continued):  
**FY 20XX Travel \$** Enter Travel dollars for two previous years, the budget year and four outyears
- 3) Click the Refresh/Resort button to sort the row of data that you entered.
- 4) Click the Recompute button to update the sub-pool Travel dollars.
- 5) Repeat for all of the sub-pools that you are responsible for.

**Note:** You could also pre-populate the Travel \$ requests from the authorized Travel \$ quantity by clicking the  button. Pressing this button will populate the Travel \$ requests from Authorized Travel \$ amounts in the C000 version.








# Where can I see the output?

## Travel \$ (Annual) Output Layout

| FTE and \$ (Annual)   |        | Travel \$ (Annual) |         | SP Units and \$ (Annual) |         | Other Dir \$ (Annual) |                                    | WYE (Annual) |            | FTE and \$ (Phase) |            | Travel \$ (Phase) |            | SP Unit    |  |
|---|--------|--------------------|---------|--------------------------|---------|-----------------------|------------------------------------|--------------|------------|--------------------|------------|-------------------|------------|------------|--|
|   |        |                    |         |                          |         |                       |                                    |              |            |                    |            |                   |            |            |  |
|  | Source | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              |                                    | FY 1998 \$   | FY 1999 \$ | FY 2000 \$         | FY 2001 \$ | FY 2002 \$        | FY 2003 \$ | FY 2004 \$ |  |
|   | DIRECT | #                  | OTHER   | INGUIDE                  | #       | 21JT                  | Applied Information Technology Div | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |  |
|   | DIRECT | #                  | OTHER   | Guide Type               | OG Type | NASA Org              | Total                              | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |  |
|   | DIRECT | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              | Total                              | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |  |
|   | Source | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              | Total                              | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |  |

1) Click the Travel \$ (Annual) output button to view the output area.

2) The following information is shown:

**Source** Source of Planned Travel dollars: Direct = Planned by YOU. Other Sources are other Service Pools, identified by the pool name in this column.

**Detail** Detail of the Source: the detail for Direct is always #. Other details are service sub-pools, identified by the sub-pool name in this column.

**DIR/OTH** Direct or Other (Direct Travel \$ are used by projects, Other Travel \$ remain in the pool).

**Guide Type** Inguide or Overguide

**OG Type** Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).





## Where can I see the output?

### Travel \$ (Annual) Output Layout

| FTE and \$ (Annual) |        | Travel \$ (Annual) |         | SP Units and \$ (Annual) |         | Other Dir \$ (Annual) |                                    | WYE (Annual) |            | FTE and \$ (Phase) |            | Travel \$ (Phase) |            | SP Unit    |
|---------------------|--------|--------------------|---------|--------------------------|---------|-----------------------|------------------------------------|--------------|------------|--------------------|------------|-------------------|------------|------------|
|                     |        |                    |         |                          |         |                       |                                    |              |            |                    |            |                   |            |            |
|                     | Source | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              |                                    | FY 1998 \$   | FY 1999 \$ | FY 2000 \$         | FY 2001 \$ | FY 2002 \$        | FY 2003 \$ | FY 2004 \$ |
|                     | DIRECT | #                  | OTHER   | INGUIDE                  | #       | 21JT                  | Applied Information Technology Div | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |
|                     | DIRECT | #                  | OTHER   | Guide Type               | OG Type | NASA Org              | Total                              | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |
|                     | DIRECT | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              | Total                              | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |
|                     | Source | Detail             | DIR/OTH | Guide Type               | OG Type | NASA Org              | Total                              | 2.000        | 28.700     | 28.700             | 28.700     | 28.700            | 28.700     | 28.700     |

3) The following information is shown (continued):

**NASA Org**  
**FY 20XX \$**

The organization requesting Travel \$.  
Travel dollars for two previous years, the budget year, and  
four outyears





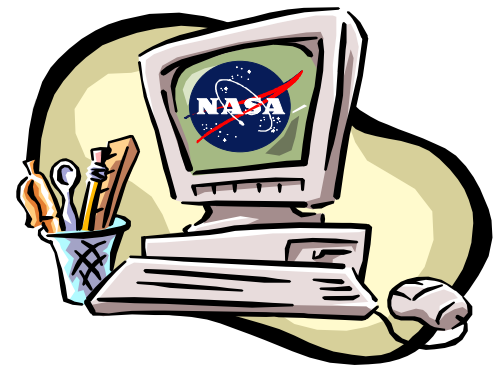
## Exercise: Requesting Travel \$

---

**Annual Scenario:** You are a Service Pool Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing Travel \$ to the appropriate Pools.



Using your exercise handout, go to  
***Service Pool Requester: Travel \$  
Distribution (steps 8-13)***





## Requesting Service Pool Units

- **Goal:** Request Service Pool units from organizations to be used by Service Pools.

- **Steps:** Entering header data:

1. Log On
2. Enter Header Data
3. Open Svc Pool (FTE, Travel, SP, Other Dir \$, WYE) folder.
4. Enter Header Data
5. Click on SP Units (Annual) Button







# What goes in the Input Layout?

**SP Units Annual Input Layout - Input Area**

|              |                     |                    |                            |                   |                           |                       |     |
|--------------|---------------------|--------------------|----------------------------|-------------------|---------------------------|-----------------------|-----|
| FTE (Annual) | FTE(Annual) - Delta | Travel \$ (Annual) | Travel \$ (Annual) - Delta | SP Units (Annual) | SP Units (Annual) - Delta | Other Dir \$ (Annual) | W ▶ |
|--------------|---------------------|--------------------|----------------------------|-------------------|---------------------------|-----------------------|-----|

Recompute Execute Allocation Prime (Req=Est) Refresh SP Rate Check Bus. Rules

Append Row Delete Row Save Print Help

| Guide Type | OG Type | BA | NASA Org | Service pool                       | Sub-pool | UOM       | SP Type | FY 1998 Units | FY 1999 Units | FY 2000 Units | FY 2001 Units |       |
|------------|---------|----|----------|------------------------------------|----------|-----------|---------|---------------|---------------|---------------|---------------|-------|
| INGUIDE    | #       | 21 | 21JT     | Applied Information Technology Div | F&RS     | FACIL&LOG | HR      | DSP           | 450.0         | 450.0         | 450.0         | 450.0 |

1) Click the append row button to add a row.

2) Enter the following:

**Guide Type**      Inguide or Overguide

**OG Type**      Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**BA**      Business Area (Center)

**NASA Org**      The organization which is requesting SP Units.

**Service Pool**      The Service Pool from which SP Units are being requested.

**Sub-pool**      The Service Sub-pool from which SP Units are being requested.





# What goes in the Input Layout? (Cont.)

| SP Units Annual Input Layout - Input Area   |         |                     |          |                                    |              |                            |     |                   |               |                           |               |                       |
|---|---------|---------------------|----------|------------------------------------|--------------|----------------------------|-----|-------------------|---------------|---------------------------|---------------|-----------------------|
| FTE (Annual)  |         | FTE(Annual) - Delta |          | Travel \$ (Annual)                 |              | Travel \$ (Annual) - Delta |     | SP Units (Annual) |               | SP Units (Annual) - Delta |               | Other Dir \$ (Annual) |
| <div> <span>Recompute</span> <span>Execute Allocation</span> <span>Prime (Req=Est)</span> <span>Refresh SP Rate</span> <span>Check Bus. Rules</span> </div> |         |                     |          |                                    |              |                            |     |                   |               |                           |               |                       |
| <div> <span>File</span> <span>Edit</span> <span>Format</span> <span>Tools</span> <span>Help</span> </div>   |         |                     |          |                                    |              |                            |     |                   |               |                           |               |                       |
| Guide Type  | OG Type | BA                  | NASA Org |                                    | Service pool | Sub-pool                   | UOM | SP Type           | FY 1998 Units | FY 1999 Units             | FY 2000 Units | FY 2001 Units         |
| INGUIDE   | #       | 21                  | 21JT     | Applied Information Technology Div | F&RS         | FACIL&LOG                  | HR  | DSP               | 450.0         | 450.0                     | 450.0         | 450.0                 |

3) Enter the following (continued):

**FY 20XX Units** The quantity of units requested.

- 4) Click the Refresh/Resort button to sort the row of data that you entered.
- 5) Click the Recompute button to update the requested SP Units.
- 6) Click the Refresh SP Rate button to pull the current SP rate. This updates the SP dollars in the output layout
- 7) Repeat for all of the sub-pools that you are requesting services from.



# What goes in the Input Layout? (Cont.)

## SP Units Annual Input Layout - Input Area

|   |                     |                    |                            |                                    |                           |                       |         |               |               |               |               |
|---|---------------------|--------------------|----------------------------|------------------------------------|---------------------------|-----------------------|---------|---------------|---------------|---------------|---------------|
| FTE (Annual)  | FTE(Annual) - Delta | Travel \$ (Annual) | Travel \$ (Annual) - Delta | SP Units (Annual)                  | SP Units (Annual) - Delta | Other Dir \$ (Annual) | W ▶     |               |               |               |               |
| <div>  Recompute            Execute Allocation            Prime (Req=Est)            Refresh SP Rate            Check Bus. Rules         </div> |                     |                    |                            |                                    |                           |                       |         |               |               |               |               |
| <div> </div>  |                     |                    |                            |                                    |                           |                       |         |               |               |               |               |
| Guide Type  | OG Type             | BA                 | NASA Org                   | Service pool                       | Sub-pool                  | UOM                   | SP Type | FY 1998 Units | FY 1999 Units | FY 2000 Units | FY 2001 Units |
| INGUIDE   | #                   | 21                 | 21JT                       | Applied Information Technology Div | F&RS                      | FACIL&LOG             | HR DSP  | 450.0         | 450.0         | 450.0         | 450.0         |

**Note:** You could also pre-populate the SP Unit requests from the estimated SP usage quantity (set in the Service Pool – Revenue Planning folder) by clicking the



button. Pressing this button will

populate the SP unit requested amount to the SP unit estimated usage in the C000 version of the SP Revenue plan.





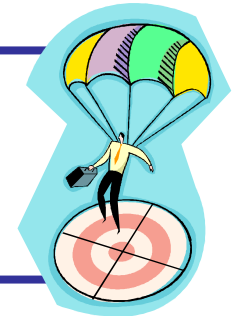


# What goes in the Input Layout? (Cont.)

## SP Units Annual Input Layout - Input Area

|              |                     |                    |                            |                                    |                           |                       |         |               |               |               |               |
|--------------|---------------------|--------------------|----------------------------|------------------------------------|---------------------------|-----------------------|---------|---------------|---------------|---------------|---------------|
| FTE (Annual) | FTE(Annual) - Delta | Travel \$ (Annual) | Travel \$ (Annual) - Delta | SP Units (Annual)                  | SP Units (Annual) - Delta | Other Dir \$ (Annual) | W ▶     |               |               |               |               |
| <div> </div> |                     |                    |                            |                                    |                           |                       |         |               |               |               |               |
| <div> </div> |                     |                    |                            |                                    |                           |                       |         |               |               |               |               |
| Guide Type   | OG Type             | BA                 | NASA Org                   | Service pool                       | Sub-pool                  | UOM                   | SP Type | FY 1998 Units | FY 1999 Units | FY 2000 Units | FY 2001 Units |
| INGUIDE      | #                   | 21                 | 21JT                       | Applied Information Technology Div | F&RS                      | FACIL&LOG             | HR DSP  | 450.0         | 450.0         | 450.0         | 450.0         |


**Note:** In order to see the SP \$ associated with your SP Unit request in the output area, you must first click the button to apply the service pool rate stored in the C000 version of the Capacity/Rate Plan.







|              |            |                     |    |                    |                                    |                            |           |                   |         |                           |               |                       |               |   |  |
|--------------|------------|---------------------|----|--------------------|------------------------------------|----------------------------|-----------|-------------------|---------|---------------------------|---------------|-----------------------|---------------|---|--|
| FTE (Annual) |            | FTE(Annual) - Delta |    | Travel \$ (Annual) |                                    | Travel \$ (Annual) - Delta |           | SP Units (Annual) |         | SP Units (Annual) - Delta |               | Other Dir \$ (Annual) |               | W |  |
| Recompute    |            | Execute Allocation  |    | Prime (Req=Est)    |                                    | Refresh SP Rate            |           | Check Bus. Rules  |         |                           |               |                       |               |   |  |
|              |            |                     |    |                    |                                    |                            |           |                   |         |                           |               |                       |               |   |  |
|              | Guide Type | OG Type             | BA | NASA Org           |                                    | Service pool               | Sub-pool  | UOM               | SP Type | FY 1998 Units             | FY 1999 Units | FY 2000 Units         | FY 2001 Units |   |  |
|              | INGUIDE    | #                   | 21 | 21JT               | Applied Information Technology Div | F&RS                       | FACIL&LOG | HR                | DSP     | 450.0                     | 450.0         | 450.0                 | 450.0         |   |  |

 button so that the service pool you are planning (in the header) receives its share of costs of other service pools it subscribes to. These costs are comprised of FTEs, FTE \$, Travel \$, Other Direct \$, and WYEs and are based on the percentage of the requested service pool's capacity being consumed by the service pool for which you are planning.







| FTE and \$ (Annual) | Travel \$ (Annual) | SP Units and \$ (Annual) | Other Dir \$ (Annual) | WYE (Annual) | FTE and \$ (Phase) | Travel \$ (Phase) | SP Units a                         |              |           |     |         |               |            |               |            |
|---------------------|--------------------|--------------------------|-----------------------|--------------|--------------------|-------------------|------------------------------------|--------------|-----------|-----|---------|---------------|------------|---------------|------------|
|                     |                    |                          |                       |              |                    |                   |                                    |              |           |     |         |               |            |               |            |
|                     | Source             | Detail                   | Guide Type            | OG Type      | BA                 | NASA Org          |                                    | Service pool | Sub-pool  | UOM | SP Type | FY 1998 Units | FY 1998 \$ | FY 1999 Units | FY 1999 \$ |
|                     | DIRECT             | #                        | INGUIDE               | #            | 21                 | 21JT              | Applied Information Technology Div | F&RS         | FACIL&LOG | HR  | DSP     | 450.0         | 1,526.549  | 450.0         | 1,526.549  |
|                     | DIRECT             | #                        | INGUIDE               | OG Type      | BA                 | NASA Org          | Total                              | Service pool | Sub-pool  |     |         | 450.0         | 1,526.549  | 450.0         | 1,526.549  |
|                     | DIRECT             | Detail                   | Guide Type            | OG Type      | BA                 | NASA Org          | Total                              | Service pool | Sub-pool  |     |         | 450.0         | 1,526.549  | 450.0         | 1,526.549  |
|                     | Source             | Detail                   | Guide Type            | OG Type      | BA                 | NASA Org          | Total                              | Service pool | Sub-pool  |     |         | 450.0         | 1,526.549  | 450.0         | 1,526.549  |

- 2) The following information is shown:

Source of Planned SP Units: Direct = Planned by YOU. Other Sources are other Service Pools, identified by the pool name in this column.

Detail of the Source: the detail for Direct is always #. Other details are service sub-pools, identified by the sub-pool name in this column.

## Inguide or Overguide

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

## Business Area (center)

The organization which is requesting SP Units.





| FTE and \$ (Annual) | Travel \$ (Annual) | SP Units and \$ (Annual) | Other Dir \$ (Annual) | WYE (Annual) | FTE and \$ (Phase) | Travel \$ (Phase) | SP Units and \$ (Phase)            |              |           |     |         |               |            |               |            |
|---------------------|--------------------|--------------------------|-----------------------|--------------|--------------------|-------------------|------------------------------------|--------------|-----------|-----|---------|---------------|------------|---------------|------------|
|                     |                    |                          |                       |              |                    |                   |                                    |              |           |     |         |               |            |               |            |
|                     | Source             | Detail                   | Guide Type            | OG Type      | BA                 | NASA Org          |                                    | Service pool | Sub-pool  | UOM | SP Type | FY 1998 Units | FY 1998 \$ | FY 1999 Units | FY 1999 \$ |
|                     | DIRECT             | #                        | INGUIDE               | #            | 21                 | 21JT              | Applied Information Technology Div | F&RS         | FACIL&LOG | HR  | DSP     | 450.0         | 1,526.549  | 450.0         | 1,526.549  |
|                     | DIRECT             | #                        | INGUIDE               | OG Type      | BA                 | NASA Org          | Total                              | Service pool | Sub-pool  |     |         | 450.0         | 1,526.549  | 450.0         | 1,526.549  |
|                     | DIRECT             | Detail                   | Guide Type            | OG Type      | BA                 | NASA Org          | Total                              | Service pool | Sub-pool  |     |         | 450.0         | 1,526.549  | 450.0         | 1,526.549  |
|                     | Source             | Detail                   | Guide Type            | OG Type      | BA                 | NASA Org          | Total                              | Service pool | Sub-pool  |     |         | 450.0         | 1,526.549  | 450.0         | 1,526.549  |

- 3) The following information is shown (continued) :
- |                     |   |
|---------------------|---|
| <b>Service pool</b> | Requested Service Pool                                      |
| <b>Sub-pool</b>     | Requested Service sub-pool                                  |
| <b>UOM</b>          | Unit of Measure   |
| <b>SP Type</b>      | ASP = Allocated Service Pool, DSP = Demand Service Pool     |
| <b>FY20XX Units</b> | The number of service pool units requested                  |
| <b>FY20XX \$</b>    | The cost of the subscription to the requested service pool. |





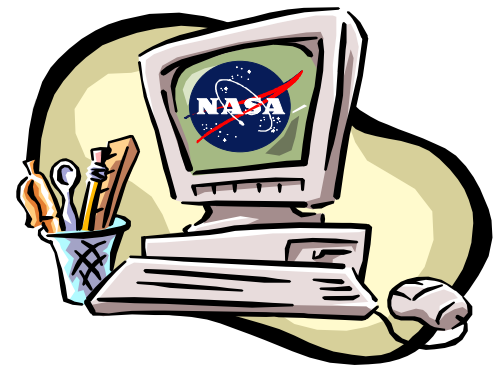
## Exercise: Requesting SP Units

---

**Annual Scenario:** You are a Service Pool Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing SP units to the appropriate Pools.



Using your exercise handout, go to  
***Service Pool Requester: Requesting  
SP Units (steps 14-19)***





## Planning Other Direct Dollars

- **Goal:** Plan Other Direct Dollars by organizations to be used by Service Pools.

- **Steps:** Entering header data:
  1. Log On
  2. Enter Header Data
  3. Open Svc Pool (FTE, Travel, SP, Other Dir \$, WYE) folder.
  4. Enter Header Data
  5. Click on Other Dir \$ (Annual) Button







# What goes in the Input Layout?

| Other Dir \$ Annual Input Layout - Input Area |            |                     |          |                                    |    |                            |             |                   |                  |                           |            |                       |  |
|---|------------|---------------------|----------|------------------------------------|----|----------------------------|-------------|-------------------|------------------|---------------------------|------------|-----------------------|--|
| FTE (Annual)                                  |            | FTE(Annual) - Delta |          | Travel \$ (Annual)                 |    | Travel \$ (Annual) - Delta |             | SP Units (Annual) |                  | SP Units (Annual) - Delta |            | Other Dir \$ (Annual) |  |
| Check Bus. Rules                              |            |                     |          |                                    |    |                            |             |                   |                  |                           |            |                       |  |
| <div> </div>                                  |            |                     |          |                                    |    |                            |             |                   |                  |                           |            |                       |  |
| DIR/OTH                                       | Guide Type | OG Type             | NASA Org |                                    | FS | Contract                   | Vendor Name | CI                | Prior Year(s) \$ | FY 1998 \$                | FY 1999 \$ | FY 2000 \$            |  |
| DIRECT  | INGUIDE    | #                   | 21SF     | Space Projects Division            | #  | A66029D                    | #           | #                 | 0.000            | 1,000.000                 | 1,000.000  | 1,000.000             |  |
| DIRECT  | INGUIDE    | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 1,000.000                 | 1,000.000  | 1,000.000             |  |
| DIRECT  | Guide Type | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 1,000.000                 | 1,000.000  | 1,000.000             |  |
| OTHER   | INGUIDE    | #                   | 21JT     | Applied Information Technology Div | #  | NAS2-98081                 | #           | #                 | 0.000            | 4,000.000                 | 4,000.000  | 4,000.000             |  |
| OTHER   | INGUIDE    | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 4,000.000                 | 4,000.000  | 4,000.000             |  |
| OTHER   | Guide Type | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 4,000.000                 | 4,000.000  | 4,000.000             |  |
| DIR/OTH                                       | Guide Type | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 5,000.000                 | 5,000.000  | 5,000.000             |  |

1) Click the append row button to add a row.

2) Enter the following:

**DIR/OTH**

Direct or Other (Direct dollars are attributable to projects, Other dollars remain in the pool).

**Guide Type**

Inguides or Overguides

**OG Type**

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**NASA Org**

The organization by which Other Dir dollars are being planned.

**FS**

Fund Source





# What goes in the Input Layout? (Cont.)

| Other Dir \$ Annual Input Layout - Input Area |            |                     |          |                                    |    |                            |             |                   |                  |                           |            |                       |  |
|---|------------|---------------------|----------|------------------------------------|----|----------------------------|-------------|-------------------|------------------|---------------------------|------------|-----------------------|--|
| FTE (Annual)                                  |            | FTE(Annual) - Delta |          | Travel \$ (Annual)                 |    | Travel \$ (Annual) - Delta |             | SP Units (Annual) |                  | SP Units (Annual) - Delta |            | Other Dir \$ (Annual) |  |
| Check Bus. Rules                              |            |                     |          |                                    |    |                            |             |                   |                  |                           |            |                       |  |
| <div> </div>                                  |            |                     |          |                                    |    |                            |             |                   |                  |                           |            |                       |  |
| DIR/OTH                                       | Guide Type | OG Type             | NASA Org |                                    | FS | Contract                   | Vendor Name | CI                | Prior Year(s) \$ | FY 1998 \$                | FY 1999 \$ | FY 2000 \$            |  |
| DIRECT  | INGUIDE    | #                   | 21SF     | Space Projects Division            | #  | A66029D                    | #           | #                 | 0.000            | 1,000.000                 | 1,000.000  | 1,000.000             |  |
| DIRECT  | INGUIDE    | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 1,000.000                 | 1,000.000  | 1,000.000             |  |
| DIRECT  | Guide Type | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 1,000.000                 | 1,000.000  | 1,000.000             |  |
| OTHER   | INGUIDE    | #                   | 21JT     | Applied Information Technology Div | #  | NAS2-98081                 | #           | #                 | 0.000            | 4,000.000                 | 4,000.000  | 4,000.000             |  |
| OTHER   | INGUIDE    | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 4,000.000                 | 4,000.000  | 4,000.000             |  |
| OTHER   | Guide Type | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 4,000.000                 | 4,000.000  | 4,000.000             |  |
| DIR/OTH                                       | Guide Type | OG Type             | NASA Org | Total                              | #  | Contract                   |             | CI                | 0.000            | 5,000.000                 | 5,000.000  | 5,000.000             |  |

3) Enter the following (continued):

- 3) **Contract** Contract number or “#” if a contract number has not been assigned yet.
- 4) **Vendor Name** Vendor name associated with the contract. (populated based on Contract # selected, not user-entered)
- 5) **CI** Commitment Item
- 6) **Prior Year(s) \$** The sum of all prior year costs
- 7) **FY20XX \$** Other Direct \$ for FY20XX

4) Click the Refresh/Resort button to sort the row of data that you entered.

5) Click the Recompute button to update the Other Direct \$.

6) Repeat for all of the other direct dollars for the sub-pool.





# Where can I see the output?

## Other Dir \$ Annual Output Layout

| Other Dir \$ Annual Output Layout |        |         |            |                    |          |                                    |    |                          |             |    |                  |                       |            |            |            |
|-----------------------------------|--------|---------|------------|--------------------|----------|------------------------------------|----|--------------------------|-------------|----|------------------|-----------------------|------------|------------|------------|
| FTE and \$ (Annual)               |        |         |            | Travel \$ (Annual) |          |                                    |    | SP Units and \$ (Annual) |             |    |                  | Other Dir \$ (Annual) |            |            |            |
| WYE (Annual)                      |        |         |            | FTE and \$ (Phase) |          |                                    |    | Travel \$ (Phase)        |             |    |                  | SP Units a            |            |            |            |
| Source                            | Detail | DIR/OTH | Guide Type | OG Type            | NASA Org |                                    | FS | Contract                 | Vendor Name | CI | Prior Year(s) \$ | FY 1998 \$            | FY 1999 \$ | FY 2000 \$ | FY 2001 \$ |
| DIRECT                            | #      | DIRECT  | INGUIDE    | #                  | 21SF     | Space Projects Division            | #  | A86029D                  | #           | #  | 0.000            | 1,000.000             | 1,000.000  | 1,000.000  | 1,000.000  |
| DIRECT                            | #      | DIRECT  | INGUIDE    | OG Type            | NASA Org | Total                              | #  | Contract                 |             | CI | 0.000            | 1,000.000             | 1,000.000  | 1,000.000  | 1,000.000  |
| DIRECT                            | #      | DIRECT  | Guide Type | OG Type            | NASA Org | Total                              | #  | Contract                 |             | CI | 0.000            | 1,000.000             | 1,000.000  | 1,000.000  | 1,000.000  |
| DIRECT                            | #      | OTHER   | INGUIDE    | #                  | 21JT     | Applied Information Technology Div | #  | NAS2-88081               | #           | #  | 0.000            | 4,000.000             | 4,000.000  | 4,000.000  | 4,000.000  |
| DIRECT                            | #      | OTHER   | INGUIDE    | OG Type            | NASA Org | Total                              | #  | Contract                 |             | CI | 0.000            | 4,000.000             | 4,000.000  | 4,000.000  | 4,000.000  |
| DIRECT                            | #      | OTHER   | Guide Type | OG Type            | NASA Org | Total                              | #  | Contract                 |             | CI | 0.000            | 4,000.000             | 4,000.000  | 4,000.000  | 4,000.000  |

1) Click the Other Dir \$ (Annual) output button to view the output area.

2) The following information is shown:

### Source

Source of Planned Other Direct \$: Direct = Planned by YOU. Other Sources are other Service Pools, identified by the pool name in this column.

### Detail

Detail of the Source: the detail for Direct is always #. Other details are service sub-pools, identified by the sub-pool name in this column.

### Guide Type

Inguide or Overguide

### OG Type

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).





## Where can I see the output? (Cont.)

### Other Dir \$ Annual Output Layout

| FTE and \$ (Annual) |        | Travel \$ (Annual) |            | SP Units and \$ (Annual) |          | Other Dir \$ (Annual)              |    | WYE (Annual) |             | FTE and \$ (Phase) |                  | Travel \$ (Phase) |            | SP Units a |            |
|---------------------|--------|--------------------|------------|--------------------------|----------|------------------------------------|----|--------------|-------------|--------------------|------------------|-------------------|------------|------------|------------|
| Source              | Detail | DIR/OTH            | Guide Type | OG Type                  | NASA Org |                                    | FS | Contract     | Vendor Name | CI                 | Prior Year(s) \$ | FY 1998 \$        | FY 1999 \$ | FY 2000 \$ | FY 2001 \$ |
| DIRECT              | #      | DIRECT             | INGUIDE    | #                        | 21SF     | Space Projects Division            | #  | A86029D      | #           | #                  | 0.000            | 1,000.000         | 1,000.000  | 1,000.000  | 1,000.000  |
| DIRECT              | #      | DIRECT             | INGUIDE    | OG Type                  | NASA Org | Total                              | #  | Contract     |             | CI                 | 0.000            | 1,000.000         | 1,000.000  | 1,000.000  | 1,000.000  |
| DIRECT              | #      | DIRECT             | Guide Type | OG Type                  | NASA Org | Total                              | #  | Contract     |             | CI                 | 0.000            | 1,000.000         | 1,000.000  | 1,000.000  | 1,000.000  |
| DIRECT              | #      | OTHER              | INGUIDE    | #                        | 21JT     | Applied Information Technology Div | #  | NAS2-88081   | #           | #                  | 0.000            | 4,000.000         | 4,000.000  | 4,000.000  | 4,000.000  |
| DIRECT              | #      | OTHER              | INGUIDE    | OG Type                  | NASA Org | Total                              | #  | Contract     |             | CI                 | 0.000            | 4,000.000         | 4,000.000  | 4,000.000  | 4,000.000  |
| DIRECT              | #      | OTHER              | Guide Type | OG Type                  | NASA Org | Total                              | #  | Contract     |             | CI                 | 0.000            | 4,000.000         | 4,000.000  | 4,000.000  | 4,000.000  |

3) The following information is shown (continued):

|                         |   |
|-------------------------|---|
| <b>NASA Org</b>         | The organization which is requesting Other Direct \$. |
| <b>FS</b>               | Fund Source   |
| <b>Contract</b>         | Contract number if assigned, otherwise #.             |
| <b>Vendor Name</b>      | Vendor Name   |
| <b>CI</b>               | Commitment Item                                       |
| <b>Prior Year(s) \$</b> | The sum of all prior year costs                       |
| <b>FY20XX \$</b>        | Other Direct \$ for FY20XX                            |



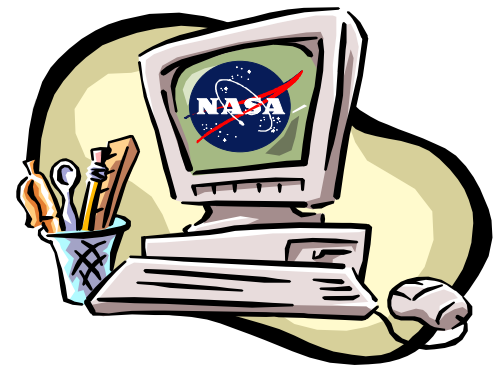


## Exercise: Other Direct \$

**Annual Scenario:** You are a Service Pool Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing Other Direct \$ to the appropriate Pools.



Using your exercise handout, go to  
***Service Pool Requester: Requesting Other  
Direct \$ (steps 20-23)***





- **Goal:** Request WYEs from organizations to be used by Service Pools.

- **Steps:** Entering header data:
  1. Log On
  2. Enter Header Data
  3. Open Svc Pool (FTE, Travel, SP, Other Dir \$, WYE) folder.
  4. Enter Header Data
  5. Click on WYE (Annual) Button







# What goes in the Input Layout?

WYE Annual Input Layout - Input Area

YE (Annual)

FTE (Phase)

FTE \$ (Phase) - Incremental

FTE \$ (Phase) - Cumulative

Travel \$ (Phase)

Travel \$ (Phase) - Incremental

Travel \$ (Phase) - Cumulative

Check Bus. Rules

| DIR/OTH | Guide Type | OG Type | NASA Org |                                    | Contract   | Vendor Name | FY 1998 WYEs | FY 1999 WYEs | FY 2000 WYEs | FY 2001 WYEs |
|---------|------------|---------|----------|------------------------------------|------------|-------------|--------------|--------------|--------------|--------------|
| DIRECT  | INGUIDE    | #       | 21SF     | Space Projects Division            | A66029D    | #           | 4.0          | 4.0          | 4.0          |              |
| DIRECT  | INGUIDE    | OG Type | NASA Org | Total                              | Contract   |             | 4.0          | 4.0          | 4.0          |              |
| OTHER   | INGUIDE    | #       | 21JT     | Applied Information Technology Div | NAS2-98081 | #           | 10.0         | 10.0         | 10.0         |              |
| OTHER   | INGUIDE    | OG Type | NASA Org | Total                              | Contract   |             | 10.0         | 10.0         | 10.0         |              |

1) Click the append row button to add a row.

2) Enter the following:

**DIR/OTH**

Direct or Other (DIRECT WYEs are attributable to projects, OTHER WYEs remain in the pool).

**Guide Type**

Inguide or Overguide

**OG Type**

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

**NASA Org**

The organization requesting WYEs.

**Contract**

Contract number or “#” if a contract number has not been assigned yet.





# What goes in the Input Layout? (Cont.)

| WYE Annual Input Layout - Input Area |            |             |          |                                    |            |                             |              |                   |              |                                 |  |
|--------------------------------------|------------|-------------|----------|------------------------------------|------------|-----------------------------|--------------|-------------------|--------------|---------------------------------|--|
| YE (Annual)                          |            | FTE (Phase) |          | FTE \$ (Phase) - Incremental       |            | FTE \$ (Phase) - Cumulative |              | Travel \$ (Phase) |              | Travel \$ (Phase) - Incremental |  |
| Check Bus. Rules                     |            |             |          |                                    |            |                             |              |                   |              |                                 |  |
| <div> </div>                         |            |             |          |                                    |            |                             |              |                   |              |                                 |  |
| DIR/OTH                              | Guide Type | OG Type     | NASA Org |                                    | Contract   | Vendor Name                 | FY 1998 WYEs | FY 1999 WYEs      | FY 2000 WYEs | FY 2001 WYEs                    |  |
| DIRECT                               | INGUIDE    | #           | 21SF     | Space Projects Division            | A66029D    | #                           | 4.0          | 4.0               | 4.0          |                                 |  |
| DIRECT                               | INGUIDE    | OG Type     | NASA Org | Total                              | Contract   |                             | 4.0          | 4.0               | 4.0          |                                 |  |
| OTHER                                | INGUIDE    | #           | 21JT     | Applied Information Technology Div | NAS2-98081 | #                           | 10.0         | 10.0              | 10.0         |                                 |  |
| OTHER                                | INGUIDE    | OG Type     | NASA Org | Total                              | Contract   |                             | 10.0         | 10.0              | 10.0         |                                 |  |

3) Enter the following (continued):

3) **Vendor Name** Vendor name associated with the contract.  
(populated based on Contract # selected, not user-entered)

4) **FY20XX WYEs** Number of WYEs requested for FY20XX

4) Click the Refresh/Resort button to sort the row of data that you entered.

5) Click the Recompute button to update WYEs.

6) Repeat for all of the WYEs for the sub-pool.





# Where can I see the output?

WYE Annual - Output Area

◀ YE (Annual)FTE (Phase)FTE \$ (Phase) - IncrementalFTE \$ (Phase) - CumulativeTravel \$ (Phase)Travel \$ (Phase) - IncrementalTravel \$ (Phase) - Cu ▶

Check Bus. Rules

FTE and \$ (Annual)Travel \$ (Annual)SP Units and \$ (Annual)Other Dir \$ (Annual)WYE (Annual)FTE and \$ (Phase)Travel \$ (Phase)SP Units a ▶

| Source | Detail   | DIR/OTH | Guide Type | OG Type | NASA Org |                                    | Contract   | Vendor Name | FY 1998 WYEs | FY 1999 WYEs | FY 2000 WYEs | F |
|--------|----------|---------|------------|---------|----------|------------------------------------|------------|-------------|--------------|--------------|--------------|---|
|        | DIRECT # | DIRECT  | INGUIDE    | #       | 21SF     | Space Projects Division            | A66028D    | #           | 4.0          | 4.0          | 4.0          |   |
|        | DIRECT # | DIRECT  | INGUIDE    | OG Type | NASA Org | Total                              | Contract   |             | 4.0          | 4.0          | 4.0          |   |
|        | DIRECT # | OTHER   | INGUIDE    | #       | 21JT     | Applied Information Technology Div | NAS2-98081 | #           | 10.0         | 10.0         | 10.0         |   |

- 1) Click the WYE (Annual) button in the output area
- 2) The following information is shown:

**Source** Source of Planned WYES Direct = Planned by YOU. Other Sources are other Service Pools, identified by the pool name in this column.

**Detail** Detail of the Source: the detail for Direct is always #. Other details are service sub-pools, identified by the sub-pool name in this column.



**DIR/OTH** Direct or Other (DIRECT WYEs are attributable to projects, OTHER WYEs remain in the pool).

**Guide Type** Inguide or Overguide





## Where can I see the output? (Cont.)

| WYE Annual - Output Area   |        |                    |         |                              |         |                             |                                    |                   |             |                                 |              |                        |            |
|--|--------|--------------------|---------|------------------------------|---------|-----------------------------|------------------------------------|-------------------|-------------|---------------------------------|--------------|------------------------|------------|
| YE (Annual)  |        | FTE (Phase)        |         | FTE \$ (Phase) - Incremental |         | FTE \$ (Phase) - Cumulative |                                    | Travel \$ (Phase) |             | Travel \$ (Phase) - Incremental |              | Travel \$ (Phase) - Cu |            |
|  Check Bus. Rules |        |                    |         |                              |         |                             |                                    |                   |             |                                 |              |                        |            |
| FTE and \$ (Annual)  |        | Travel \$ (Annual) |         | SP Units and \$ (Annual)     |         | Other Dir \$ (Annual)       |                                    | WYE (Annual)      |             | FTE and \$ (Phase)              |              | Travel \$ (Phase)      | SP Units a |
|  |        |                    |         |                              |         |                             |                                    |                   |             |                                 |              |                        |            |
|                   | Source | Detail             | DIR/OTH | Guide Type                   | OG Type | NASA Org                    |                                    | Contract          | Vendor Name | FY 1998 WYEs                    | FY 1999 WYEs | FY 2000 WYEs           | F          |
|  | DIRECT | #                  | DIRECT  | INGUIDE                      | #       | 21SF                        | Space Projects Division            | A66028D           | #           | 4.0                             | 4.0          | 4.0                    |            |
|  | DIRECT | #                  | DIRECT  | INGUIDE                      | OG Type | NASA Org                    | Total                              | Contract          |             | 4.0                             | 4.0          | 4.0                    |            |
|  | DIRECT | #                  | OTHER   | INGUIDE                      | #       | 21JT                        | Applied Information Technology Div | NAS2-98081        | #           | 10.0                            | 10.0         | 10.0                   |            |

3) The following information is shown (continued):

### OG Type

Type of Overguide: Unassigned (#), New Initiative (NEWINIT), Augmentation (AUGMENT) or Price (PRICE).

### NASA Org

The organization requesting WYEs.

### Contract

Contract number or “#” if a contract number has not been assigned yet.

### FY20XX WYEs

The number of WYEs.



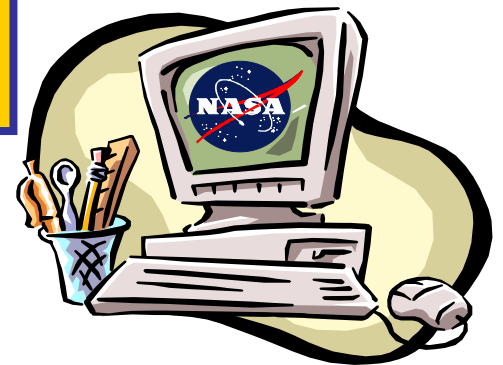


## Exercise: Requesting WYEs

**Annual Scenario:** You are a Service Pool Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for distributing the work-year equivalents (WYE) to the appropriate Pools.

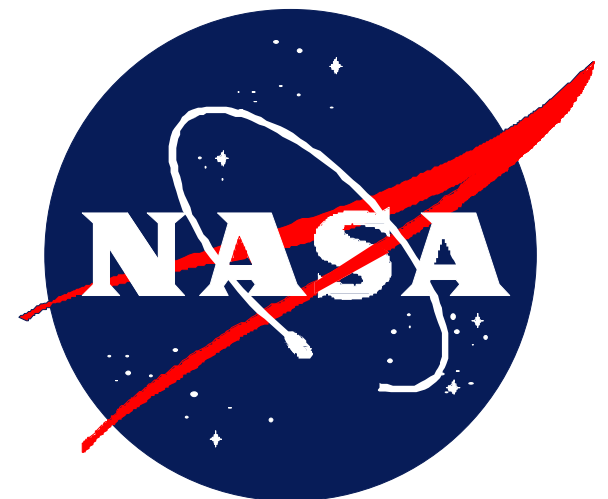


Using your exercise handout, go to  
***Service Pool Requester: Requesting WYEs***  
**(steps 24-26)**



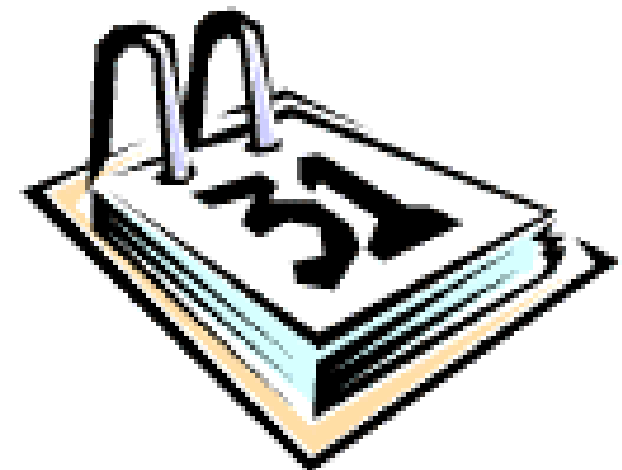


# Phasing





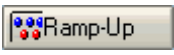


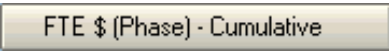



- During initial and mid-year phasing plan creation, phasing occurs for projects, service pools, Center G&A and Corporate G&A using manual entry or algorithms built into the system.
  
- Phasing Topics:
  - How to phase
  - Phasing algorithms
  - Incremental and cumulative phasing





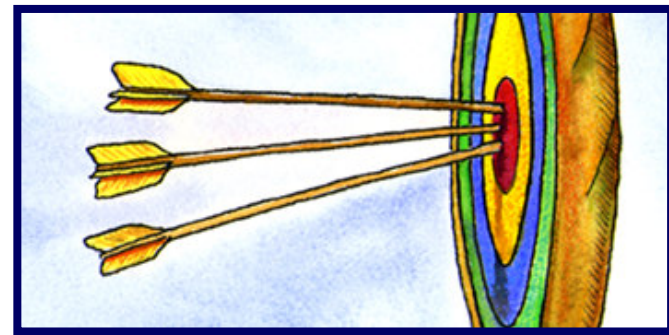
# Phasing Algorithms

- **Straight-Line:** 
  - Uses the same percentage in each month (Total / 12)
- **User-Defined:** 
  - Allows you to define a series of percentages to apply to the amounts for each month
- **Ramp Up:**  (Only Available for WYEs, Travel, & SP)
  - Amount *increases* each month & average equals the annual planned
- **Ramp Down:**  (Only Available for WYEs, Travel, & SP)
  - Amount *decreases* each month & average equals the annual planned
- **Manual:** 
  - Manually enter the numbers Cost Center by Cost Center.
- **Cumulative Phasing** 
  - Carries in prior year money available monthly
- **Incremental Phasing** 
  - Shows the entire amount of money carried in from prior years that has been phased up to the current month
- Each button, if used, applies the same algorithm to all of the Cost Center that were planned during the annual planning.



## Phasing Goal

- We will be doing exercises pertaining to Phasing. Therefore, we will review the steps needed to phase.
- **Goal:** Use the phasing input areas to phase Service Pool requests for FTEs, FTE \$, Travel \$, Service Pool Units, Other Direct Costs, and WYEs.
- **Why:** The Service Pool Requestor is responsible for developing the phasing plan that will be used in the execution year to track monthly status and variances.





# Header Data for Phasing

| Service Pool Requester Header Area |                |           |                               |         |
|------------------------------------|----------------|-----------|-------------------------------|---------|
| Name                               | Descriptn      | Selection | Char. value ext.              | S       |
| Center                             | BA             | 24        | Dryden Flight Research Center |         |
| Budget Year                        | Budget Year    | 2037      |                               | 2037    |
| Agency Version                     | Agency Version | A001      |                               | Pre-POP |
| Center Version                     | Center Version | C001      |                               | C001    |
| Center G&A                         | Cost center    | 2460CR003 | Resources Mgt Branch - G&A    |         |
| Fiscal Year                        | Fiscal year    | 2035      |                               | 2035    |

**Center**

The two-digit Center number (24).

**Budget Year**

The Budget year you are planning.

**Agency Version**

The Agency Version you are working in

**Center Version**

The Center Version you are working in (C001-C005).

**Center G&A**

The Cost Center making the request.

**Fiscal Year**

The fiscal year you are phasing.





# Secondary Service Pool Phasing

Planning Folder Edit Goto System Help

Execute Svc Pool (FTE, Travel, SP, Oth Dir \$, WYE)

| Name of Variab... | Descriptn      | Selection | Char. value ext.              |
|-------------------|----------------|-----------|-------------------------------|
| Center            | BA             | 24        | Dryden Flight Research Center |
| Budget Year       | Budget Year    | 2037      | 2037                          |
| Agency Version    | Agency Version | A001      | Pre-POP                       |
| Center Version    | Center Version | C001      | C001                          |
| Service Pool      | Pool           | F&RS      | FACIL & REL SERVICES          |
| Service Sub-Pool  | Sub-Pool       | FACI...   | FACILSVCS                     |
| Fiscal Year       | Fiscal year    | 2035      | 2035                          |

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules

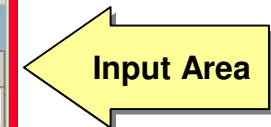
YE (Annual) FTE (Phase) FTE \$ (Phase) - Incremental FTE \$ (Phase) - Cumulative Travel \$ (Phase) Travel \$ (Phase) - Incremental Travel \$ (Phase) - C...

Recompute Straight-Line User-Defined Refresh FTE Rate Check Bus. Rules

| DIR/OTH | Guide Type | OG Type | NASA Org | LC                            | APR - FTEs | MAY - FTEs | JUN - FTEs | JUL - FTEs | AUG - FTEs | SEP - FTEs | Avg 2035 |
|---------|------------|---------|----------|-------------------------------|------------|------------|------------|------------|------------|------------|----------|
| DIRECT  | INGUIDE    | #       | 2400MM   | Research Systems Directorate  | 10.0       | 10.0       | 10.0       | 10.0       | 10.0       | 10.0       |          |
| DIRECT  | INGUIDE    | #       | 2400OO   | Flight Operations Directorate | 5.0        | 5.0        | 5.0        | 5.0        | 5.0        | 5.0        |          |

FTE and \$ (Annual) Travel \$ (Annual) SP Units and \$ (Annual) Other Dir \$ (Annual) WYE (Annual) FTE and \$ (Phase) Travel \$ (Phase) SP Units a

| Source | Detail | DIR/OTH | Guide Type | OG Type | NASA Org | LC                            | OCT - FTEs | OCT - \$ | NOV - FTEs | NOV - \$ | DEC - FTEs | DEC - \$ | JAN - FTEs | JA |
|--------|--------|---------|------------|---------|----------|-------------------------------|------------|----------|------------|----------|------------|----------|------------|----|
| DIRECT | #      | DIRECT  | INGUIDE    | #       | 2400MM   | Research Systems Directorate  | 10.0       | 0.000    | 10.0       | 0.000    | 10.0       | 0.000    | 10.0       |    |
| DIRECT | #      | DIRECT  | INGUIDE    | #       | 2400OO   | Flight Operations Directorate | 5.0        | 0.000    | 5.0        | 0.000    | 5.0        | 0.000    | 5.0        |    |
| DIRECT | #      | DIRECT  | INGUIDE    | OG Type | NASA Org | Total                         | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       |    |
| DIRECT | #      | DIRECT  | Guide Type | OG Type | NASA Org | Total                         | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       |    |







# Secondary Service Pool Phasing

Planning Folder Edit Goto System Help

Execute Svc Pool (FTE, Travel, SP, Oth Dir \$, WYE)

| Name of Variab... | Descriptn      | Selection | Char. value ext.              |
|-------------------|----------------|-----------|-------------------------------|
| Center            | BA             | 24        | Dryden Flight Research Center |
| Budget Year       | Budget Year    | 2037      | 2037                          |
| Agency Version    | Agency Version | A001      | Pre-POP                       |
| Center Version    | Center Version | C001      | C001                          |
| Service Pool      | Pool           | F&RS      | FACIL & REL SERVICES          |
| Service Sub-Pool  | Sub-Pool       | FACI...   | FACILSVCS                     |
| Fiscal Year       | Fiscal year    | 2035      | 2035                          |

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules

YE (Annual) FTE (Phase) FTE \$ (Phase) - Incremental FTE \$ (Phase) - Cumulative Travel \$ (Phase) Travel \$ (Phase) - Incremental Travel \$ (Phase) - C...

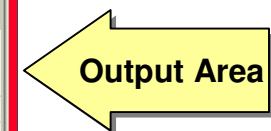
Recompute Straight-Line User-Defined Refresh FTE Rate Check Bus. Rules

| DIR/OTH | Guide Type | OG Type | NASA Org | LC                            | APR - FTEs | MAY - FTEs | JUN - FTEs | JUL - FTEs | AUG - FTEs | SEP - FTEs | Avg 2035 |
|---------|------------|---------|----------|-------------------------------|------------|------------|------------|------------|------------|------------|----------|
| DIRECT  | INGUIDE    | #       | 2400MM   | Research Systems Directorate  | 10.0       | 10.0       | 10.0       | 10.0       | 10.0       | 10.0       |          |
| DIRECT  | INGUIDE    | #       | 2400OO   | Flight Operations Directorate | 5.0        | 5.0        | 5.0        | 5.0        | 5.0        | 5.0        |          |

FTE and \$ (Annual) Travel \$ (Annual) SP Units and \$ (Annual) Other Dir \$ (Annual) WYE (Annual) FTE and \$ (Phase) Travel \$ (Phase) SP Units a

| Source | Detail | DIR/OTH | Guide Type | OG Type | NASA Org | LC                            | OCT - FTEs | OCT - \$ | NOV - FTEs | NOV - \$ | DEC - FTEs | DEC - \$ | JAN - FTEs | JAN - \$ |
|--------|--------|---------|------------|---------|----------|-------------------------------|------------|----------|------------|----------|------------|----------|------------|----------|
| DIRECT | #      | DIRECT  | INGUIDE    | #       | 2400MM   | Research Systems Directorate  | 10.0       | 0.000    | 10.0       | 0.000    | 10.0       | 0.000    | 10.0       | 0.000    |
| DIRECT | #      | DIRECT  | INGUIDE    | #       | 2400OO   | Flight Operations Directorate | 5.0        | 0.000    | 5.0        | 0.000    | 5.0        | 0.000    | 5.0        | 0.000    |
| DIRECT | #      | DIRECT  | INGUIDE    | OG Type | NASA Org | Total                         | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       | 0.000    |
| DIRECT | #      | DIRECT  | Guide Type | OG Type | NASA Org | Total                         | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       | 0.000    | 15.0       | 0.000    |

Start Eudora - [In] Meeting Maker@ - ... SAP Logon Pad 620 Execute Svc Pool... Document1 - Micro... 12:35 PM







# Straight-Line Phasing of FTEs

Straight-Line FTE (Phase) – Input Area

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules

YE (Annual) FTE (Phase) FTE \$(Phase) - Incremental FTE \$(Phase) - Cumulative Travel \$(Phase) Travel \$(Phase) - Incremental Travel \$(Phase) - C

Recompute Straight-Line User-Defined Refresh FTE Rate Check Bus. Rules

Save Print Transfer Variables Help

| Guide Type | OG Type | NASA Org | LC                            | OCT - FTEs | NOV - FTEs | DEC - FTEs | JAN - FTEs | FEB - FTEs | MAR - FTEs | APR - FTEs | MAY - FTEs |
|------------|---------|----------|-------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| INGUIDE    | #       | 2400MM   | Research Systems Directorate  | #          | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        |
| INGUIDE    | #       | 2400OO   | Flight Operations Directorate | #          | 0.5        | 0.5        | 0.5        | 0.5        | 0.5        | 0.5        | 0.5        |
| INGUIDE    | OG Type | NASA Org | Total                         | LC         | 1.2        | 1.2        | 1.2        | 1.2        | 1.2        | 1.2        | 1.2        |
| Guide Type | OG Type | NASA Org | Total                         | LC         | 1.2        | 1.2        | 1.2        | 1.2        | 1.2        | 1.2        | 1.2        |

- 1) In the Header Area, ensure the fiscal year is set the year you want to plan.
- 2) Select the appropriate FTE (Phase) input layout.
- 3) Click the Straight-Line button. All of the FTEs you have planned will appear in each month for the fiscal year.
- 4) Make any adjustments to the numbers.
- 5) Click the Transfer Variables button to sort the data you entered.
- 6) Click the Recompute button to total your rows and move the data to the output area
- 7) View the resulting output in the FTE and \$ (Phase) output area.
- 8) Click the save button when complete.



# Ramp Up & Ramp Down

Travel \$ (Phase) – Input Area

< ^YE (Annual)
FTE (Phase)
FTE \$(Phase) - Incremental
FTE \$(Phase) - Cumulative
Travel \$(Phase)
Travel \$(Phase) - Incremental
Travel \$(Phase) - C ▶

Recompute
Straight-Line
Ramp-Up
Ramp-Down
User-Defined
Check Bus. Rules

Guide Type
OG Type
NASA Org

OCT - \$
NOV - \$
DEC - \$
JAN - \$
FEB - \$
MAR - \$
APR - \$
MAY - \$
JUN - \$
JUL - \$
AUG - \$
SEP - \$
Total 2003 \$

|            |         |          |             |        |        |        |        |        |        |        |        |        |        |        |        |        |         |
|------------|---------|----------|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| INGUIDE    | #       | 62PS01   | PROCUREMENT | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 200.000 |
| INGUIDE    | OG Type | NASA Org | Total       | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 200.000 |
| Guide Type | OG Type | NASA Org | Total       | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 16.667 | 200.000 |


- 1) In the Header Area, ensure the fiscal year is set the year you want to plan.
- 2) Select the appropriate input layout.
- 3) Click the Ramp Up or Ramp Down.
- 4) Make any adjustments to the numbers.
- 5) Click the Transfer Variables button to sort the data you entered.
- 6) Click the Recompute button to total your rows and move the data to the output area
- 7) View the resulting output in the output area.
- 8) Click the save button when complete.



# User-Defined Phasing of FTEs

**User-Defined % (Phase) – Input Area**



ase
Travel \$(Phase) - Incremental
Travel \$(Phase) - Cumulative
SP Units (Phase)
SP Units (Phase) - Delta
WYE (Phase)
User-Defined % (Phase)



|                    | OCT - % | NOV - % | DEC - % | JAN - % | FEB - % | MAR - % | APR - % | MAY - % | JUN - % | JUL - % | AUG - % | SEP - % |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Phasing: FTE       | 120     | 120     | 120     | 120     | 120     | 120     | 80      | 80      | 80      | 80      | 80      | 80      |
| Phasing: Travel    | 120     | 120     | 120     | 120     | 120     | 120     | 80      | 80      | 80      | 80      | 80      | 80      |
| Phasing: Svc Pools | 120     | 120     | 120     | 120     | 120     | 120     | 80      | 80      | 80      | 80      | 80      | 80      |
| Phasing: WYE       | 120     | 120     | 120     | 120     | 120     | 120     | 80      | 80      | 80      | 80      | 80      | 80      |

- 1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase.
- 2) In the input area, scroll to the right until you see the User-Defined % (Phase) button.
- 3) Enter the percentages you want to phase with. (The average of the cells in a row must add up to 100).

(continued)

**Note:** Unlike most of the other input areas, the User-Defined % (Phase) input area does not require you to click either the Transfer Variables button  or the Recompute button.  Do not worry, your data will be saved.







# User-Defined Phasing of FTEs

**User Defined FTE (Phase) – Input and Output Areas**

< Y/E (Annual) **FTE (Phase)** FTE \$(Phase) - Incremental FTE \$(Phase) - Cumulative Travel \$(Phase) Travel \$(Phase) - Incremental Travel \$(Phase) - C >

Recompute Straight-Line **User-Defined** Refresh FTE Rate Check Bus. Rules

User-Defined

| Guide Type | OG Type | NASA Org | LC                            | OCT - FTEs | NOV - FTEs | DEC - FTEs | JAN - FTEs | FEB - FTEs | MAR - FTEs | APR - FTEs | MAY - FTEs |
|------------|---------|----------|-------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| INGUIDE    | #       | 2400MM   | Research Systems Directorate  | #          | 0.8        | 0.8        | 0.8        | 0.8        | 0.8        | 0.6        | 0.6        |
| INGUIDE    | #       | 2400OO   | Flight Operations Directorate | #          | 0.6        | 0.6        | 0.6        | 0.6        | 0.6        | 0.4        | 0.4        |
| INGUIDE    | OG Type | NASA Org | Total                         | LC         | 1.4        | 1.4        | 1.4        | 1.4        | 1.4        | 1.0        | 1.0        |
| Guide Type | OG Type | NASA Org | Total                         | LC         | 1.4        | 1.4        | 1.4        | 1.4        | 1.4        | 1.0        | 1.0        |

FTE and \$(Annual) Travel \$(Annual) SP Units and \$(Annual) Other Dir \$(Annual) WYE (Annual) **FTE and \$(Phase)** Travel \$(Phase) SP Units a

| Source | Detail | Guide Type | OG Type | NASA Org | LC | OCT - FTEs | OCT - \$ | NOV - FTEs | NOV - \$ | DEC - FTEs | DEC - \$ | JAN - FTEs | JAN - \$ | FEB - FTEs | FEB - \$ | MAR - FTEs | MAR - \$ |
|--------|--------|------------|---------|----------|----|------------|----------|------------|----------|------------|----------|------------|----------|------------|----------|------------|----------|
| DIRECT | #      | INGUIDE    | #       | 2400MM   | #  | 0.8        | 0.000    | 0.8        | 0.000    | 0.8        | 0.000    | 0.8        | 0.000    | 0.8        | 0.000    | 0.8        | 0.00     |
| DIRECT | #      | INGUIDE    | #       | 2400OO   | #  | 0.6        | 0.000    | 0.6        | 0.000    | 0.6        | 0.000    | 0.6        | 0.000    | 0.6        | 0.000    | 0.6        | 0.00     |
| DIRECT | #      | INGUIDE    | OG Type | NASA Org | LC | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.00     |
| DIRECT | Detail | Guide Type | OG Type | NASA Org | LC | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.00     |
| Source | Detail | Guide Type | OG Type | NASA Org | LC | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.000    | 1.4        | 0.00     |

- 4) In the input area, click the FTE (Phase) button.
- 5) In the lower-level of input area buttons, click the User Defined button to apply the percentages to the annual numbers.
- 6) View the resulting FTE output in the FTE and \$ (Phase) output area.
- 7) Click the Save button when complete.





# Manual Phasing of FTEs

**FTE (Phase) – Input**

◀ YE (Annual) **FTE (Phase)** FTE \$(Phase) - Incremental FTE \$(Phase) - Cumulative Travel \$(Phase) Travel \$(Phase) - Incremental Travel \$(Phase) - C ▶

Recompute Straight-Line User-Defined Refresh FTE Rate Check Bus. Rules

Append Row Transfer Variables

| Guide Type | OG Type | NASA Org |                              | LC | OCT - FTEs | NOV - FTEs | DEC - FTEs | JAN - FTEs | FEB - FTEs | MAR - FTEs | APR - FTEs | MAY - FTEs |
|------------|---------|----------|------------------------------|----|------------|------------|------------|------------|------------|------------|------------|------------|
| INGUIDE    | #       | 2400MM   | Research Systems Directorate | #  | .7         |            |            |            |            |            |            |            |

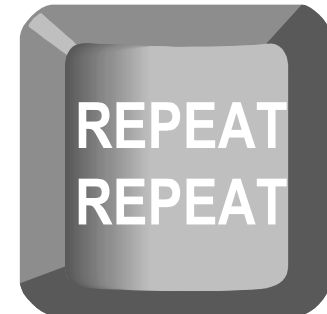
◀ ▶

- 1) In the Header Area, ensure the fiscal year is set to year you want to phase.
- 2) In the input area, click on the FTE (Phase) button.
- 3) Click on the append a row button to add a row.
- 4) Enter the direct/other, guide type, overguide type, Cost Center, labor category, and the monthly numbers for the Cost Center.
- 5) Click the transfer variables button to sort the new row.
- 6) Repeat for each Cost Center.
- 7) Click the Save button when complete.



## Phasing FTE\$, Travel, SP, and WYEs

- The Phasing Algorithm buttons work the same way for each of the other areas not demonstrated
  - FTE \$
  - Travel
  - Service Pools
  - WYEs
- Each has an output area where you can see the associated dollars by month.





# Incremental and Cumulative Phasing

- The difference between Incremental vs. Cumulative Phasing layouts:
  - Incremental layout depicts the monthly phased \$ for a single month in the month columns.
  - Cumulative layout depicts the year-to-date phased \$ in the month columns.

## Incremental

|                | Carry In | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2058 \$ |
|----------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|
| OBS - Prior PY | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         |
| OBS - Curr PY  | 0.000    | 60.000   | 75.000   | 60.000   | 75.000   | 60.000   | 75.000   | 60.000   | 75.000   | 60.000   | 75.000   | 60.000   | 75.000   | 810.000       |

The same data presented differently

## Cumulative

|                | Carry In | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2058 \$ |
|----------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|
| OBS - Prior PY | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         |
| OBS - Curr PY  | 0.000    | 60.000   | 135.000  | 195.000  | 270.000  | 330.000  | 405.000  | 465.000  | 540.000  | 600.000  | 675.000  | 735.000  | 810.000  | 810.000       |





# Phase \$ - Incremental

FTE \$ (Phase) - Incremental

◀ YE (Annual)

FTE (Phase)

FTE \$ (Phase) - Incremental








FTE \$ (Phase) - Cumulative

Travel \$ (Phase)

Travel \$ (Phase) - Incremental

T

Recompute



|                  | Carry In | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2003 \$ | Carry Out |
|------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
| OBS - Prior PY   | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
| OBS - Curr PY    | 0.000    | 125.000  | 83.333   | 83.333   | 83.333   | 156.250  | 156.250  | 156.250  | 156.250  | 156.250  | 156.250  | 156.250  | 416.667  | 1,885.417     | 0.000     |
| COSTS - Prev PY  | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
| COSTS - Prior PY | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
| COSTS - Curr PY  | 0.000    | 125.000  | 83.333   | 83.333   | 83.333   | 156.250  | 156.250  | 156.250  | 156.250  | 156.250  | 156.250  | 156.250  | 416.667  | 1,885.417     | 0.000     |
| COSTS - TOTAL    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |

- 1) In the Header Area, ensure the fiscal year is set the year you want to plan.
- 2) In the input area, click the FTE \$ (Phase) – Incremental button.
- 3) Enter Carry In values for:
 









|                  |  |
|------------------|--|
| OBS – Prior PY   | Prior Program Year money available to obligate                             |
| COSTS – Prior PY | Obligated Prior Program Year money available to cost.                      |
| COSTS – Prev PY  | The sum of all Obligated money available to cost (predating the Prior PY). |
| COSTS – TOTAL    | Total of all your Program Year costs                                       |





# Phase \$ - Cumulative

FTE \$ (Phase) - Cumulative

|  |             |                              |                             |                   |                                 |                   |          |          |           |           |           |           |           |               |           |
|--|-------------|------------------------------|-----------------------------|-------------------|---------------------------------|-------------------|----------|----------|-----------|-----------|-----------|-----------|-----------|---------------|-----------|
| ◀ FY (Annual)  | FTE (Phase) | FTE \$ (Phase) - Incremental | FTE \$ (Phase) - Cumulative | Travel \$ (Phase) | Travel \$ (Phase) - Incremental | Travel \$ (Phase) |          |          |           |           |           |           |           |               |           |
| Recompute  |             |                              |                             |                   |                                 |                   |          |          |           |           |           |           |           |               |           |
| <div><div></div></div> |             |                              |                             |                   |                                 |                   |          |          |           |           |           |           |           |               |           |
|  | Carry In    | OCT - \$                     | NOV - \$                    | DEC - \$          | JAN - \$                        | FEB - \$          | MAR - \$ | APR - \$ | MAY - \$  | JUN - \$  | JUL - \$  | AUG - \$  | SEP - \$  | Total 2003 \$ | Carry Out |
| OBS - Prior PY   | 0.000       | 0.000                        | 0.000                       | 0.000             | 0.000                           | 0.000             | 0.000    | 0.000    | 0.000     | 0.000     | 0.000     | 0.000     | 0.000     | 0.000         | 0.000     |
| OBS - Curr PY  | 0.000       | 125.000                      | 208.333                     | 291.667           | 375.000                         | 531.250           | 687.500  | 843.750  | 1,000.000 | 1,156.250 | 1,312.500 | 1,468.750 | 1,885.417 | 1,885.417     | 0.000     |
| COSTS - Prev PY  | 0.000       | 0.000                        | 0.000                       | 0.000             | 0.000                           | 0.000             | 0.000    | 0.000    | 0.000     | 0.000     | 0.000     | 0.000     | 0.000     | 0.000         | 0.000     |
| COSTS - Prior PY   | 125.000     | 0.000                        | 0.000                       | 0.000             | 0.000                           | 0.000             | 0.000    | 0.000    | 0.000     | 0.000     | 0.000     | 0.000     | 0.000     | 0.000         | 125.000   |
| COSTS - Curr PY  | 0.000       | 125.000                      | 208.333                     | 291.667           | 375.000                         | 531.250           | 687.500  | 843.750  | 1,000.000 | 1,156.250 | 1,312.500 | 1,468.750 | 1,885.417 | 1,885.417     | 0.000     |
| COSTS - TOTAL  | 0.000       | 0.000                        | 0.000                       | 0.000             | 0.000                           | 0.000             | 0.000    | 0.000    | 0.000     | 0.000     | 0.000     | 0.000     | 0.000     | 0.000         | 0.000     |

- 1) In the Header Area, ensure the fiscal year is set the year you want to plan.
- 2) Select the FTE \$ (Phase) – Cumulative input layout.
- 3) Enter Carry In values for:
 

|                  |  |
|------------------|--|
| OBS – Prior PY   | Prior Program Year money available to obligate                             |
| COSTS – Prior PY | Obligated Prior Program Year money available to cost.                      |
| COSTS – Prev PY  | The sum of all Obligated money available to cost (predating the Prior PY). |
| COSTS – TOTAL    | Total of all your Program Year costs                                       |





## Header Data for Other Direct \$ Phasing

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|                        |   |
|------------------------|---|
| <b>Center</b>          | The two-digit Center number (24).   |
| <b>Budget Year</b>     | The Budget year you are planning.   |
| <b>Agency Version</b>  | The Agency Version you are working in   |
| <b>Center Version</b>  | The Center Version you are working in (C001-C005)   |
| <b>Center G&amp;A</b>  | The Cost Center you are phasing for   |
| <b>Fiscal Year</b>     | The fiscal year you are phasing   |
| <b>Guide Type</b>      | Inguide or Overguide<br>(continued)   |
| <b>Overguide Type</b>  | Overguide type: New Initiative, Augment, Price or (#)<br>unassigned. You must enter unassigned (#) if you<br>selected inguide |
| <b>Org/Cost Center</b> | The Cost Center from which Other Dir \$ are being<br>requested  |
| <b>Fund Source</b>     | Fund Source   |
| <b>Contract</b>        | The contract number (or “#” if a contract number has<br>not been assigned yet)  |
| <b>Commitment Item</b> | Commitment Item   |





# Incremental Phasing – Other Direct \$

| Incremental Phasing of Other Direct \$ - Input Area |                  |                        |          |          |          |          |          |          |          |          |          |                  |          |          |               |           |
|---|------------------|------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|------------------|----------|----------|---------------|-----------|
| Incremental   |                  | Cumulative             |          |          |          |          |          |          |          |          |          |                  |          |          |               |           |
| Recompute   |                  | Phasing: Straight-Line |          |          |          |          |          |          |          |          |          | Check Bus. Rules |          |          |               |           |
| <div> </div>  |                  |                        |          |          |          |          |          |          |          |          |          |                  |          |          |               |           |
|   |                  | Carry In               | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$         | AUG - \$ | SEP - \$ | Total 2003 \$ | Carry Out |
|   | OBS - Prior PY   | 0.000                  | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000            | 0.000    | 0.000    | 0.000         | 0.000     |
|   | OBS - Curr PY    | 0.000                  | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000           | 25.000   | 25.000   | 300.000       | 0.000     |
|   | COSTS - Prev PY  | 0.000                  | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000            | 0.000    | 0.000    | 0.000         | 0.000     |
|   | COSTS - Prior PY | 0.000                  | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000            | 0.000    | 0.000    | 0.000         | 0.000     |
|   | COSTS - Curr PY  | 0.000                  | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000           | 25.000   | 25.000   | 300.000       | 0.000     |
|   | COSTS - TOTAL    | 0.000                  | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000            | 0.000    | 0.000    | 0.000         | 0.000     |

- 1) In the Header Area, ensure the fiscal year is set the year you want to plan.
- 2) Click the Incremental button.
- 3) Enter Carry In values for:
 

|                 |  |
|-----------------|--|
| OBS – Prior PY  | Prior Program Year money available to obligate                             |
| OBS – Curr PY   | Current Program Year money available to obligate                           |
| COSTS – Prev PY | The sum of all Obligated money available to cost (predating the Prior PY). |






# Incremental Phasing – Other Direct \$

Incremental Phasing of Other Direct \$ - Input Area

IncrementalCumulative

RecomputePhasing: Straight-LineCheck Bus. Rules



|  |                  | Carry In | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2003 \$ | Carry Out |
|--|------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
|  | OBS - Prior PY   | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
|  | OBS - Curr PY    | 0.000    | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 300.000       | 0.000     |
|  | COSTS - Prev PY  | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
|  | COSTS - Prior PY | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
|  | COSTS - Curr PY  | 0.000    | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 25.000   | 300.000       | 0.000     |
|  | COSTS - TOTAL    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |

4) Enter Carry In values for (continued):

COSTS – Prior PY      Obligated Prior Program Year money available to cost.

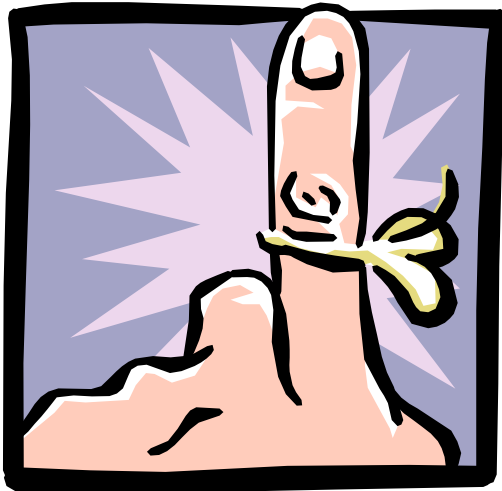
COSTS – Curr PY      Current year obligated money to be costed

COSTS – TOTAL      Total of all your Program Year costs



# Cumulative Phasing – Other Direct \$

| Cumulative Phasing of Other Direct \$ - Input Area |                  |                  |          |          |          |          |          |          |          |          |          |          |          |          |               |           |
|--|------------------|------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
| Incremental  |                  | Cumulative       |          |          |          |          |          |          |          |          |          |          |          |          |               |           |
| Recompute  |                  | Check Bus. Rules |          |          |          |          |          |          |          |          |          |          |          |          |               |           |
|  |                  |                  |          |          |          |          |          |          |          |          |          |          |          |          |               |           |
|  |                  | Carry In         | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2003 \$ | Carry Out |
|  | OBS - Prior PY   | 0.000            | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
|  | OBS - Curr PY    | 0.000            | 25.000   | 50.000   | 75.000   | 100.000  | 125.000  | 150.000  | 175.000  | 200.000  | 225.000  | 250.000  | 275.000  | 300.000  | 300.000       | 0.000     |
|  | COSTS - Prev PY  | 0.000            | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
|  | COSTS - Prior PY | 0.000            | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |
|  | COSTS - Curr PY  | 0.000            | 25.000   | 50.000   | 75.000   | 100.000  | 125.000  | 150.000  | 175.000  | 200.000  | 225.000  | 250.000  | 275.000  | 300.000  | 300.000       | 0.000     |
|  | COSTS - TOTAL    | 0.000            | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000         | 0.000     |



**Reminder:** Cumulative phased data is the same as Incremental phased data only presented differently. Therefore, we will not review Cumulative phased data during this course.





# Review Travel Dollars Phasing Plan

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- Goal: Review Travel Dollar requests submitted by Service Pool Requesters.
- Entering header data:
  1. Log On
  2. Open Service Pools – Secondary Travel \$ Dist Folder
  3. Enter Header Data
  4. Click on Travel \$ (Phase) Button in the output area
  5. Click on the Travel \$ (Phase) – Incremental button in the output area
  6. Click on the Travel \$ (Phase) – Cumulative button in the output area





# Service Pools – Secondary Travel \$ Dist Folder

## Travel \$ (Phase) Output Layout

| Travel \$ (Annual) |            |         |          | Travel \$ (Phase) |          |          |          | Travel \$ (Phase) - Incremental |          |          |          | Travel \$ (Phase) - Cumulative |          |          |          |          |               |
|--------------------|------------|---------|----------|-------------------|----------|----------|----------|---------------------------------|----------|----------|----------|--------------------------------|----------|----------|----------|----------|---------------|
|                    |            |         |          |                   |          |          |          |                                 |          |          |          |                                |          |          |          |          |               |
|                    | Guide Type | OG Type | Sub-Pool |                   | OCT - \$ | NOV - \$ | DEC - \$ | JAN - \$                        | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$                       | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2058 \$ |
|                    | INGUIDE    | #       | OFFICE   | OFFICE            | 20.000   | 20.000   | 20.000   | 20.000                          | 20.000   | 20.000   | 20.000   | 20.000                         | 20.000   | 20.000   | 20.000   | 20.000   | 240.000       |
|                    | INGUIDE    | OG Type | Sub-Pool | Total             | 20.000   | 20.000   | 20.000   | 20.000                          | 20.000   | 20.000   | 20.000   | 20.000                         | 20.000   | 20.000   | 20.000   | 20.000   | 240.000       |
|                    | Guide Type | OG Type | Sub-Pool | Total             | 20.000   | 20.000   | 20.000   | 20.000                          | 20.000   | 20.000   | 20.000   | 20.000                         | 20.000   | 20.000   | 20.000   | 20.000   | 240.000       |

1) Click the Travel \$ (Phase) output button to view the output area.

2) The following information is shown:

**Guide Type**

Inguide or Overguide

**OG Type**

The type of Overguide: New Initiative, Augment, Price, and (#) unassigned.

**Sub-Pool**

The sub-pool the Travel dollars are assigned to.

**Oct - Sep \$**

Travel dollars for each month of the Fiscal Year

**Total 20XX \$**

The total Travel dollars for all months of the Fiscal Year.





# Service Pools – Secondary Travel \$ Dist Folder

## Travel \$ (Phase) - Incremental Output Layout

| Travel \$ (Annual) |                         | Travel \$ (Phase) |          | Travel \$ (Phase) - Incremental |          | Travel \$ (Phase) - Cumulative |          |          |          |          |          |          |          |          |               |           |
|--------------------|-------------------------|-------------------|----------|---------------------------------|----------|--------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
|                    |                         | Carry In          | OCT - \$ | NOV - \$                        | DEC - \$ | JAN - \$                       | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2058 \$ | Carry Out |
|                    | <b>OBS - Prior PY</b>   | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |
|                    | <b>OBS - Curr PY</b>    | 0.000             | 90.000   | 100.000                         | 100.000  | 100.000                        | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 1,190.000     | 0.000     |
|                    | <b>COSTS - Prev PY</b>  | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |
|                    | <b>COSTS - Prior PY</b> | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |
|                    | <b>COSTS - Curr PY</b>  | 0.000             | 70.000   | 100.000                         | 100.000  | 100.000                        | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 1,170.000     | 0.000     |
|                    | <b>COSTS - TOTAL</b>    | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |

3) Click the Travel \$ (Phase) Incremental output button to view the output area.

4) The following information is shown:

### Rows:

**OBS – Prior PY** Obligation plan for prior program year dollars

**OBS – Curr PY** Obligation plan for current program year dollars

**COSTS – Prev PY** Cost plan for ALL previous program years before Curr PY and Prior PY dollars

**COSTS – Prior PY** Cost plan for prior program year dollars

**COSTS – Curr PY** Cost plan for current program year dollars

**COSTS – TOTAL** Cost plan of all your Program Year dollars (not a summation of prior 3 rows)





# Service Pools – Secondary Travel \$ Dist Folder

## Travel \$ (Phase) - Incremental Output Layout

| Travel \$ (Annual) |                  | Travel \$ (Phase) |          | Travel \$ (Phase) - Incremental |          | Travel \$ (Phase) - Cumulative |          |          |          |          |          |          |          |          |               |           |
|--------------------|------------------|-------------------|----------|---------------------------------|----------|--------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|---------------|-----------|
|                    |                  | Carry In          | OCT - \$ | NOV - \$                        | DEC - \$ | JAN - \$                       | FEB - \$ | MAR - \$ | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$ | SEP - \$ | Total 2058 \$ | Carry Out |
|                    | OBS - Prior PY   | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |
|                    | OBS - Curr PY    | 0.000             | 90.000   | 100.000                         | 100.000  | 100.000                        | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 1,190.000     | 0.000     |
|                    | COSTS - Prev PY  | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |
|                    | COSTS - Prior PY | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |
|                    | COSTS - Curr PY  | 0.000             | 70.000   | 100.000                         | 100.000  | 100.000                        | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 100.000  | 1,170.000     | 0.000     |
|                    | COSTS - TOTAL    | 10.000            | 10.000   | 0.000                           | 0.000    | 0.000                          | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 0.000    | 10.000        | 0.000     |

5) The following information is shown (continued):

### Columns:

**Carry In**

**Balance carried in from Previous and Prior Years**

**Oct – Sep \$**

**Phased Travel dollar plan for each month of the Fiscal Year, shown in monthly incremental values**

**Total 20XX \$**

**Total of monthly phased Travel dollars.**

**Carry Out**

**Balance planned to be carried out for Current, Prior, and Previous year dollars**





# Service Pools – Secondary Travel \$ Dist Folder

## Travel \$ (Phase) - Cumulative Output Layout

| Travel \$ (Phase) - Cumulative Output Layout |                         |                   |          |                                 |          |          |          |          |                                |          |          |          |           |           |               |           |
|--|-------------------------|-------------------|----------|---------------------------------|----------|----------|----------|----------|--------------------------------|----------|----------|----------|-----------|-----------|---------------|-----------|
| Travel \$ (Annual)                           |                         | Travel \$ (Phase) |          | Travel \$ (Phase) - Incremental |          |          |          |          | Travel \$ (Phase) - Cumulative |          |          |          |           |           |               |           |
|  |                         | Carry In          | OCT - \$ | NOV - \$                        | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$ | APR - \$                       | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$  | SEP - \$  | Total 2058 \$ | Carry Out |
|  | <b>OBS - Prior PY</b>   | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |
|  | <b>OBS - Curr PY</b>    | 0.000             | 90.000   | 190.000                         | 290.000  | 390.000  | 490.000  | 590.000  | 690.000                        | 790.000  | 890.000  | 990.000  | 1,090.000 | 1,190.000 | 1,190.000     | 0.000     |
|  | <b>COSTS - Prev PY</b>  | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |
|  | <b>COSTS - Prior PY</b> | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |
|  | <b>COSTS - Curr PY</b>  | 0.000             | 70.000   | 170.000                         | 270.000  | 370.000  | 470.000  | 570.000  | 670.000                        | 770.000  | 870.000  | 970.000  | 1,070.000 | 1,170.000 | 1,170.000     | 0.000     |
|  | <b>COSTS - TOTAL</b>    | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |

1) Click the Travel \$ (Phase) Cumulative output button to view the output area.

2) The following information is shown:

### Rows:

**OBS – Prior PY** Obligation plan for prior program year dollars

**OBS – Curr PY** Obligation plan for current program year dollars

**COSTS – Prev PY** Cost plan for ALL previous program years before Curr PY and Prior PY dollars

**COSTS – Prior PY** Cost plan for prior program year dollars

**COSTS – Curr PY** Cost plan for current program year dollars


**COSTS – TOTAL** Cost plan of all your Program Year dollars (not a summation of prior 3 rows)





# Service Pools – Secondary Travel \$ Dist Folder

## Travel \$ (Phase) - Cumulative Output Layout

| Travel \$ (Annual)  |                  | Travel \$ (Phase) |          | Travel \$ (Phase) - Incremental |          |          |          | Travel \$ (Phase) - Cumulative |          |          |          |          |           |           |               |           |
|---|------------------|-------------------|----------|---------------------------------|----------|----------|----------|--------------------------------|----------|----------|----------|----------|-----------|-----------|---------------|-----------|
|   |                  |                   |          |                                 |          |          |          |                                |          |          |          |          |           |           |               |           |
|  |                  | Carry In          | OCT - \$ | NOV - \$                        | DEC - \$ | JAN - \$ | FEB - \$ | MAR - \$                       | APR - \$ | MAY - \$ | JUN - \$ | JUL - \$ | AUG - \$  | SEP - \$  | Total 2058 \$ | Carry Out |
|   | OBS - Prior PY   | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |
|   | OBS - Curr PY    | 0.000             | 90.000   | 190.000                         | 290.000  | 390.000  | 490.000  | 590.000                        | 690.000  | 790.000  | 890.000  | 990.000  | 1,090.000 | 1,190.000 | 1,190.000     | 0.000     |
|   | COSTS - Prev PY  | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |
|   | COSTS - Prior PY | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |
|   | COSTS - Curr PY  | 0.000             | 70.000   | 170.000                         | 270.000  | 370.000  | 470.000  | 570.000                        | 670.000  | 770.000  | 870.000  | 970.000  | 1,070.000 | 1,170.000 | 1,170.000     | 0.000     |
|   | COSTS - TOTAL    | 10.000            | 10.000   | 10.000                          | 10.000   | 10.000   | 10.000   | 10.000                         | 10.000   | 10.000   | 10.000   | 10.000   | 10.000    | 10.000    | 10.000        | 0.000     |

3) The following information is shown (continued):

### Columns:

**Carry In**

**Balance carried in from Previous and Prior Years**

**Oct – Sep \$**

**Phased Travel dollar plan for each month of the Fiscal Year, shown in monthly cumulative values**

**Total 20XX \$**

**Total of monthly phased Travel dollars.**

**Carry Out**

**Balance planned to be carried out for Current, Prior, and Previous year dollars**



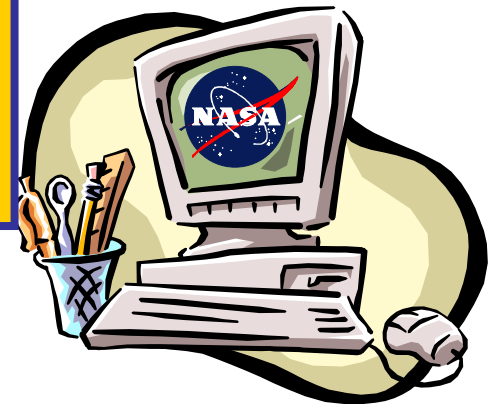


## Exercise: Service Pool Phasing

- **Annual Scenario:** You are a Center Service Pool Requester for the Ames Research Center (ARC). During Pre-POP and/or POP, you are responsible for phasing the civil service FTEs, travel \$, service pool, other direct cost, and work-year equivalent (WYE) annual requirements needed to support your Center Service Pool. You now want to phase these requests



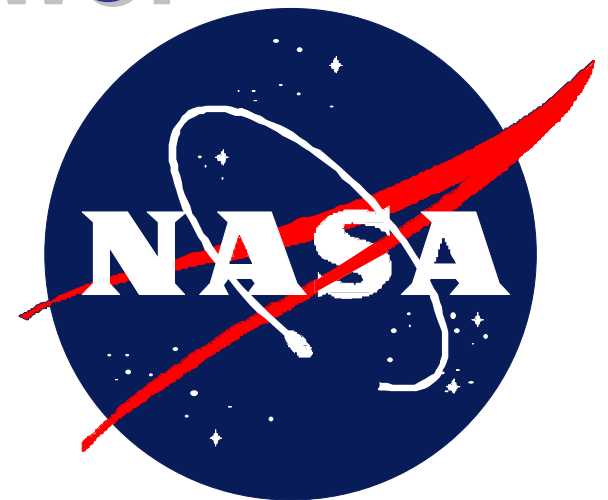
Using your exercise handout, go to  
***Service Pool Requesters: Phasing  
(steps 1-33)***





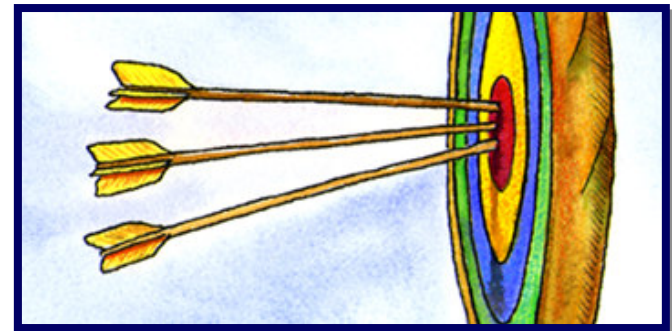
# Welcome to Budget Formulation

## BW Report Viewer Overview





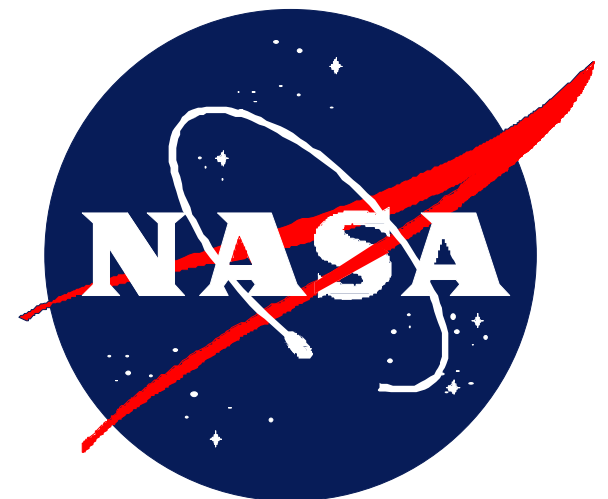
- At the end of this course, individuals should be able to
  - Log into the Budget Formulation BW Reports website.
  - Define report parameters
  - Run Budget Formulation BW Reports
  - Manipulate report
  - Print reports





# Topic 1

## Logging In







# Logging In

- Mac Users
- Logon to NISSU / Citrix
  - URL
    - <https://utility.nasa.gov>

NISSU Logon

The login form is titled "Login" and has a question mark icon in the top right corner. It contains three input fields, each preceded by a red dot and a label: "Username", "Password", and "SecureID Passcode (PIN + Token Code)". A "Log In" button is located at the bottom right of the form.

NISSU Application Options

The screenshot shows the MetaFrame XP Applications screen. At the top, it says "Citrix MetaFrameXP" and "Logout". Below this is a section titled "Applications" with a "Top" button and an "Up" button. There are five application icons: "Training", "Bankcard", "Business Warehouse", "SapGUI", and "Travel Manager".

Welcome to the NASA Services Citrix Server Farm

**MetaFrame XP Applications**

Welcome to your personalized view of MetaFrame XP applications. The Applications box contains icons for the applications that you can use. Click an icon to launch an application. Click Refresh to view the latest applications. Click Settings to change your settings. Click a folder icon to display its contents. If you have problems using an application, please contact the IMCC at 1-866-986-4778 for more information.

**MetaFrame XP Message Center**

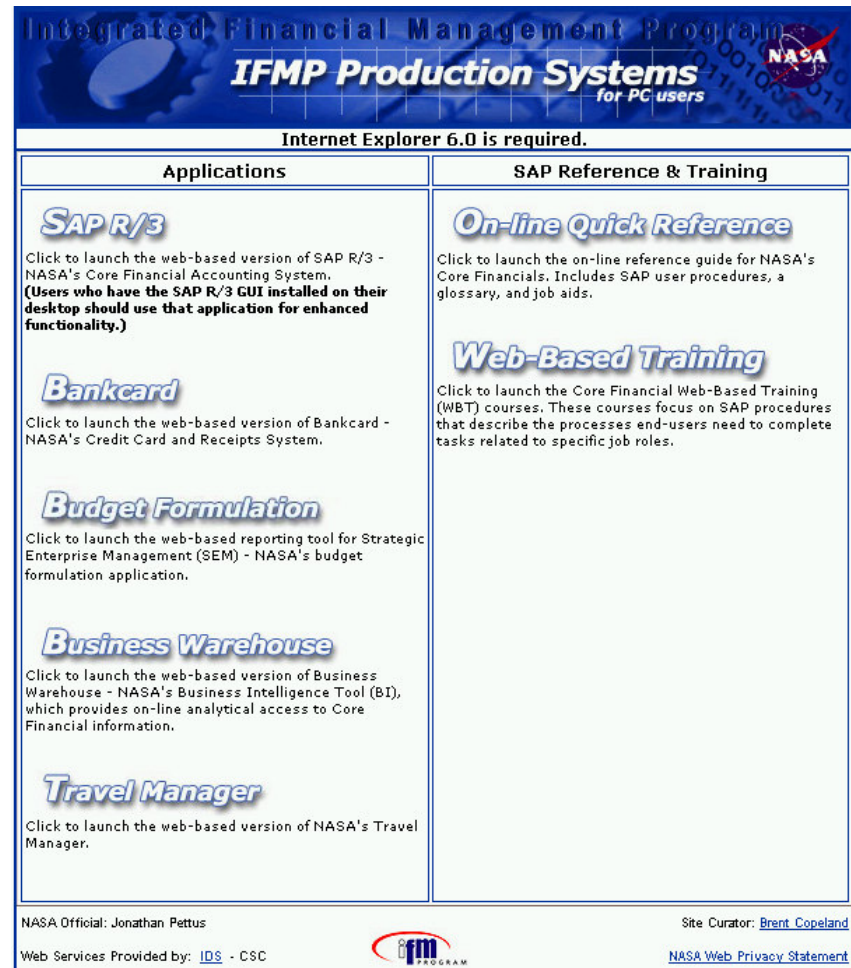
The MetaFrame XP Message Center displays any informational or error messages that may occur.

**This Is a U.S. Government Computer**  
This system is for the use of authorized users only.  
By accessing and using the computer system you are consenting to system monitoring, including the monitoring of keystrokes. Unauthorized use of, or access to, this computer system may subject you to disciplinary action and criminal prosecution.



## ■ PC Users

- Go To IE
- URL:
  - <https://access.ifmp.nasa.gov>
- Choose Budget Formulation



**Integrated Financial Management Program**  
**IFMP Production Systems**  
 for PC users

Internet Explorer 6.0 is required.

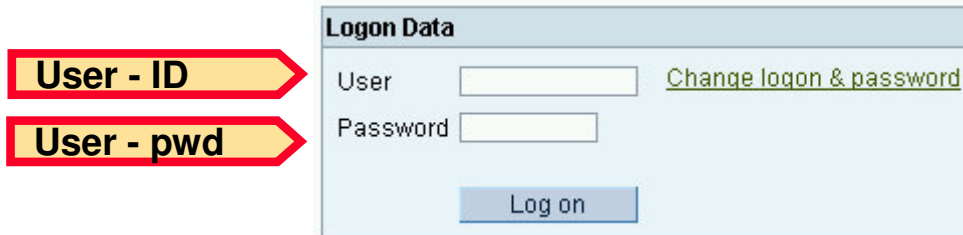
| Applications   | SAP Reference & Training  |
|--|---|
| <p><b>SAP R/3</b></p> <p>Click to launch the web-based version of SAP R/3 - NASA's Core Financial Accounting System.<br/> <b>(Users who have the SAP R/3 GUI installed on their desktop should use that application for enhanced functionality.)</b></p> <p><b>Bankcard</b></p> <p>Click to launch the web-based version of Bankcard - NASA's Credit Card and Receipts System.</p> <p><b>Budget Formulation</b></p> <p>Click to launch the web-based reporting tool for Strategic Enterprise Management (SEM) - NASA's budget formulation application.</p> <p><b>Business Warehouse</b></p> <p>Click to launch the web-based version of Business Warehouse - NASA's Business Intelligence Tool (BI), which provides on-line analytical access to Core Financial information.</p> <p><b>Travel Manager</b></p> <p>Click to launch the web-based version of NASA's Travel Manager.</p> | <p><b>On-line Quick Reference</b></p> <p>Click to launch the on-line reference guide for NASA's Core Financials. Includes SAP user procedures, a glossary, and job aids.</p> <p><b>Web-Based Training</b></p> <p>Click to launch the Core Financial Web-Based Training (WBT) courses. These courses focus on SAP procedures that describe the processes end-users need to complete tasks related to specific job roles.</p> |

NASA Official: Jonathan Pettus  
 Web Services Provided by: IDS - CSC

Site Curator: Brent Copeland  
[NASA Web Privacy Statement](#)



- You will be prompted to enter your User Name and Password
  - Enter your SEM User Name and Password

A screenshot of a web-based logon form titled 'Logon Data'. The form has a light blue background. It contains two input fields: 'User' and 'Password'. To the right of the 'User' field is a link that says 'Change logon & password'. Below the input fields is a 'Log on' button. To the left of the form, there are two yellow callout boxes with red borders and arrowheads pointing to the 'User' and 'Password' fields respectively. The first callout box contains the text 'User - ID' and the second contains 'User - pwd'.

**User - ID**

**User - pwd**

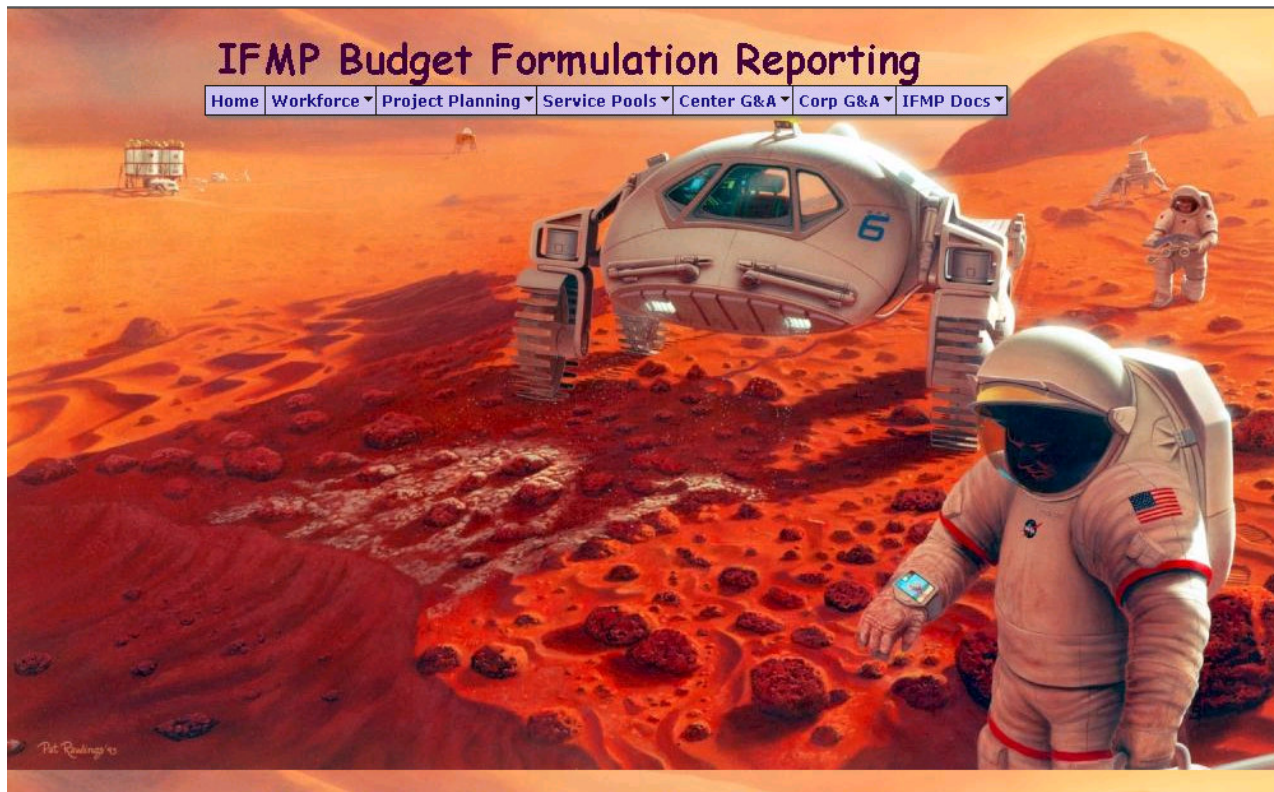
**Logon Data**

User  [Change logon & password](#)

Password



### ■ Main Menu of Budget Formulation Reports Portal







## Using the pull-down menus

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- **The lavender colored pull-down menus contain links to each of the reports in the system.**

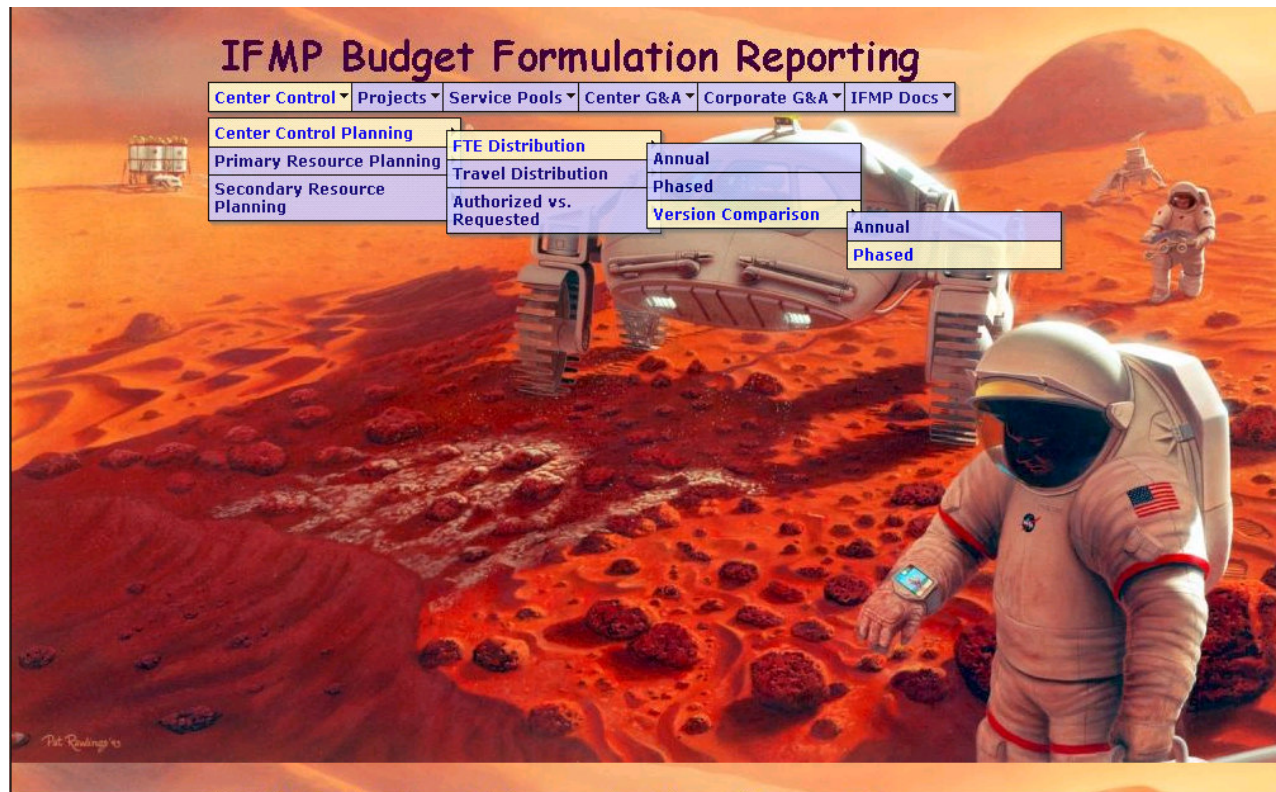
### **Select a report by:**

- **Hover over a top level menu item until it turns yellow**
- **Click the yellow menu item**
- **A sub-menu will appear**
- **Navigate through the sub-menu by hovering over the menu options**
- **Click on the menu item of the report that you wish to run**



# Using the pull-down menus

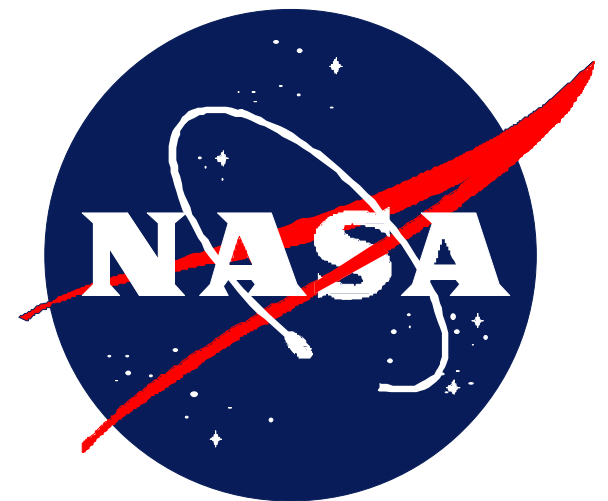
- Pull Down Menu 'sample'





# Topic 3


## Viewing Reports





- Once you have finished entering your variables and have clicked the “Execute” button, your report is displayed




**BW**

[Home](#)
[Workforce](#)
[Projects](#)
[Service Pools](#)
[Center G&A](#)
[Corporate G&A](#)
[IFMP Docs](#)
[Print Report](#)

**Web Application**

Zoom In 50 % Zoom Out Email Comments

**Navigation block:**

|                              |  |             |  |            |  |
|------------------------------|--|-------------|--|------------|--|
| Business area                |  | Fiscal year |  | Guide Type |  |
| Labor Category               |  | NASA Org    |  | OG Type    |  |
| AR: ANN - FTE Rate, Qty, Amt |  |             |  |            |  |

**Variable Values**

|                   |                       |
|-------------------|-----------------------|
| Most Current Data | <= 293                |
| Center            | Glenn Research Center |
| Budget Year       | 2060                  |
| Agency Version    | Pre-POP               |
| Center Version    | GRC Pre POP           |
| NASA Org          | Empty Demarcation     |
| Labor Category    | Not assigned          |

**Center Control FTE Distribution**

| NASA Org              | Labor Category | Guide Type | OG Type      | Fiscal year 2058 |          |              | 2059         |          |              | 2060         |  |
|-----------------------|----------------|------------|--------------|------------------|----------|--------------|--------------|----------|--------------|--------------|--|
|                       |                |            |              | FTE Rate \$K     | FTE QTY  | FTE \$K      | FTE Rate \$K | FTE QTY  | FTE \$K      | FTE Rate \$K |  |
| 220140 AEROPROPULSION | Not assigned   | In Guide   | Not assigned | \$ 100.00000     | 10.0 FTE | \$ 1,000.000 | \$ 104.00000 | 10.0 FTE | \$ 1,040.000 | \$ 108.      |  |
| 220200 CFO            | Not assigned   | In Guide   | Not assigned | \$ 80.00000      | 50.0 FTE | \$ 4,000.000 | \$ 83.20000  | 50.0 FTE | \$ 4,160.000 | \$ 86.       |  |
| 220500 OSAT           | Not assigned   | In Guide   | Not assigned | \$ 70.00000      | 60.0 FTE | \$ 4,200.000 | \$ 72.80000  | 60.0 FTE | \$ 4,368.000 | \$ 75.       |  |





## Entering Variables

- Once you have selected a report, you will be prompted to enter variables for the report
- The report will use the variables you enter to determine which records should be displayed (just like the header area in planning folders)

**Variables for NASA: Single Query Template**

|                    |   |                      |    |                      |         |   |
|--------------------|---|----------------------|----|----------------------|---------|---|
| Center             | = | <input type="text"/> | to | <input type="text"/> | Include | <input type="button" value="Insert Row"/> |
| Budget Year (*)    |   | <input type="text"/> |    |                      |         |   |
| Agency Version (*) |   | <input type="text"/> |    |                      |         |   |
| Center Version (*) |   | <input type="text"/> |    |                      |         |   |
| NASA Org           | = | <input type="text"/> | to | <input type="text"/> | Include | <input type="button" value="Insert Row"/> |
| Labor Category     | = | <input type="text"/> | to | <input type="text"/> | Include | <input type="button" value="Insert Row"/> |



## ■ Features of the navigation block

- Drill-down
- Drill-across
- Filter Value

## ■ Miscellaneous

- Click the icon to hide the Navigation block, Variables block, or the Data block of a report
- Click the icon to show the Navigation block, Variables block, or the Data block of a report
- Dollar amounts are expressed in thousands (\$810,000)

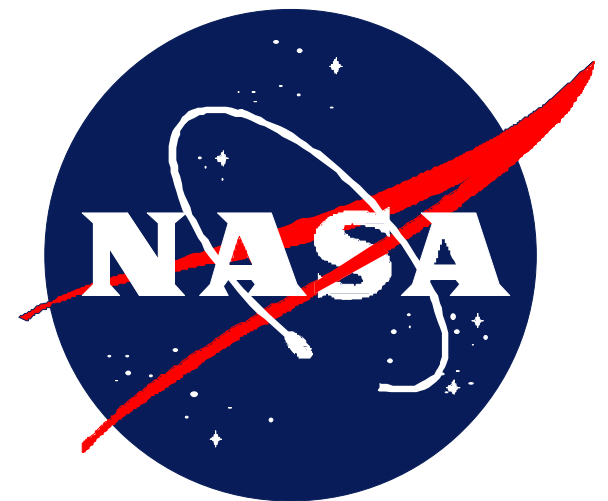


- **Some useful features of the context menu**
  - **Exporting data to Excel**
  - **Sorting rows**
  - **Bookmaking**



# Topic 4

## Printing Reports





- **Reports can be formatted for printing so that**
  - **Page numbers appear**
  - **Screen colors are removed**
  - **Data fits better on a page**
  - **Headers and footers are included on each page**





- **To generate printable output**
  1. Run a report.
  2. Click the “Print Reports” menu item
  3. Click the “Print Table 1” sub-menu
  4. Adjust print settings
  5. Print.





# Adjusting Print Settings

☒ Preview Mode

**Header Line**

height (inches)       indent left (inches)       intent right (inches)

**Data Area**

padding top (inches)       indent left (inches)       indent right (inches)

Data Rows       **Data Columns**

**Footer Line**

height (inches)       indent left (inches)       intent right (inches)

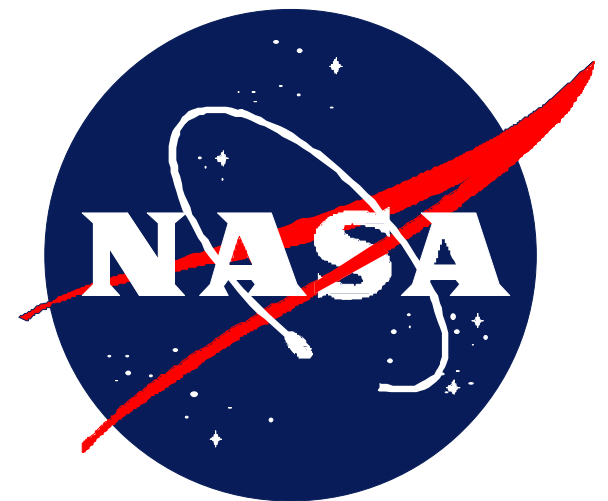
**Select Print Orientation and Font**

▼

**Enter**   **Reset**



# End of Course Review







## Review Objectives & Expectations

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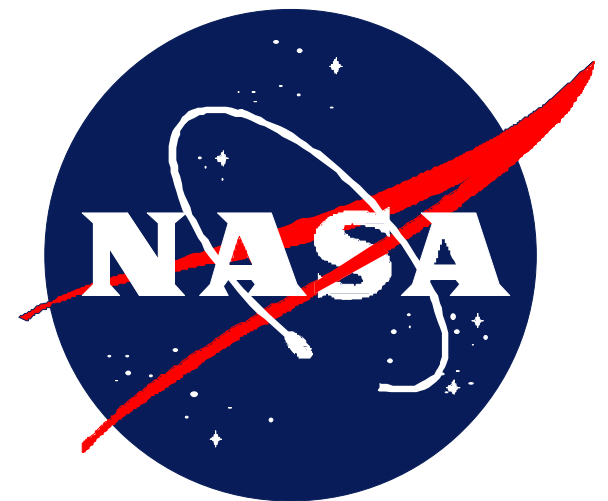
■ Individuals should now be able to:



- ✓ Perform Secondary Distribution of FTEs and Travel Dollars to Service Sub-pools.
- ✓ View phasing plans done by requestors for FTEs, Travel Dollars, SP Units, Other Direct Dollars, and WYEs
- ✓ Access and manipulate Service Pool reports



# Congratulations!





# Training Course Feedback

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- The training course feedback will:
  - Assess the effectiveness of the instruction and training materials for the course

